

**Ambulance**  
Victoria



# Financial Transactional Services | Proposed Redesign

Staff & Union Consultation

10 March 2021

[ambulance.vic.gov.au](https://ambulance.vic.gov.au)



# Consultation agenda

## What does consultation cover?

Proposal to be consulted upon:

- ▶ Structure & roles
- ▶ Position details & impacts
- ▶ Position descriptions (PDs)

## Briefing overview

- ▶ Why change?
- ▶ Design principles
- ▶ Expected benefits
- ▶ Proposed functions
- ▶ Proposed key changes
- ▶ Proposed structure & roles
- ▶ Proposed Billings staffing model
- ▶ Redesign process
- ▶ Consultation obligations
- ▶ Next steps & timeline





# Financial Transactional Services

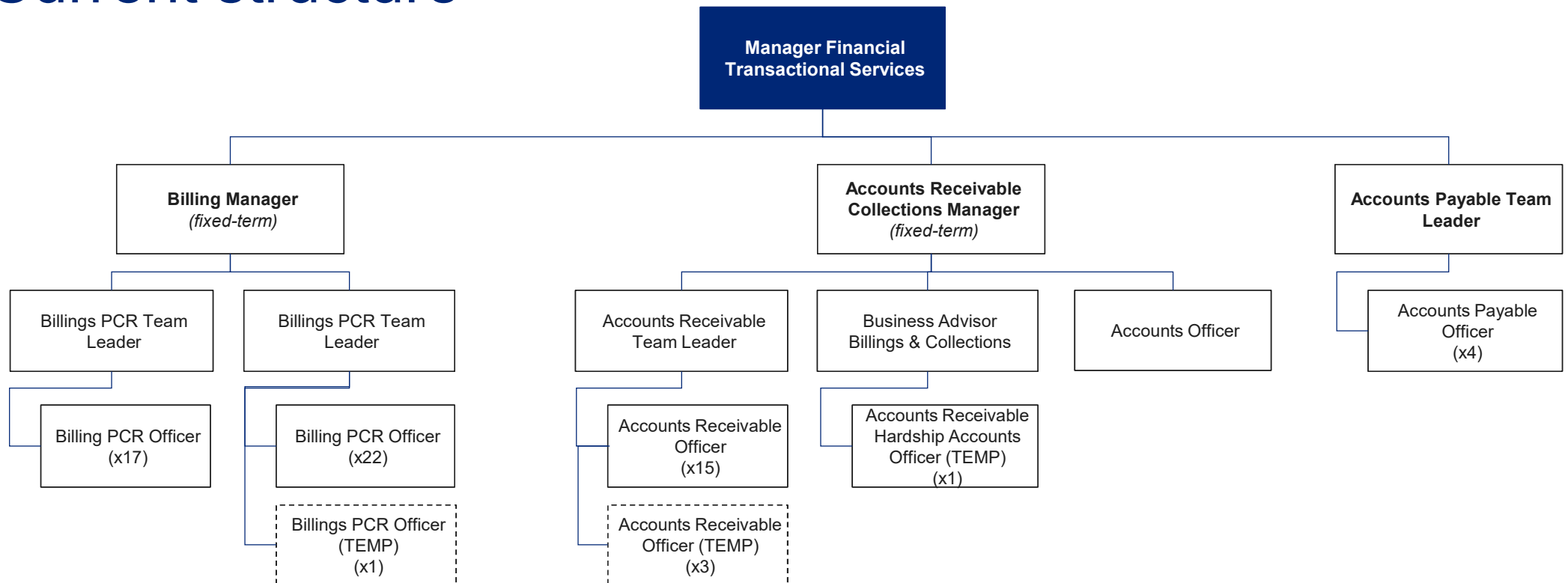
Financial Transactional Services (FTS) is part of Ambulance Victoria's Corporate Services division.

FTS leads AV's core financial transactional services, including Accounts Payable, Accounts Receivable and PCR/Billing, ensuring AV's financial transactions are timely and accurately recorded whilst meeting regulatory requirements.



# Financial Transactional Services |

## Current structure



Note: Numbers in (brackets) refer to total FTE



# Why Change?

- ▶ **Findings of internal and external reviews** - subsequent recommendations and project initiatives have changed how we work and what is required now and into the future
- ▶ **Diverse accountabilities within large teams** - can impeded our ability to provide high level support to both individuals and teams to deliver on performance expectations
- ▶ **Recognise roles with multiple areas of responsibility and accountabilities** – can result in inadequate coverage or capability to deliver performance results at times
- ▶ **Portfolio siloes** - develop individuals to enable sustained and supported collaborative efforts to maintain workload performance across all team accountabilities
- ▶ **Address past and present challenges that have created uncertainty** - strengthening of leadership and teamwork capabilities, uniting to support consistency in efforts to enhance performance delivery
- ▶ **Provide role clarity and clearly define accountabilities** - to support staff to perform their roles, and build their capabilities as part of a team
- ▶ **Strengthen team capability** - organising teams within functions with complimentary skill sets to support workload, promoting teamwork and building resilience.
- ▶ **Career progression pathway** - opportunities to support the development of individuals within our teams
- ▶ **Recognition** – to support and encourage performance of both individual and team wellbeing equally, recognising individuals efforts to build a workplace culture that is collaborative and living AV Values



# Design principles

A set of principles underpin the design of the FTS structure. These principles have been used to guide the thinking and actions during the FTS review and provide a consistent approach to the design process.

Customer first -  
accountabilities and roles  
are responsive to internal  
and external demands

Structure is aligned to  
support the achievement of  
AV's strategic objectives

Accountability - create  
consistent and clear lines of  
responsibility for staff

Strengthen capability,  
accountability and staff  
supervision across the  
team to successfully  
delivery FTS outcomes

Improve performance with a  
focus on customer  
experience across all  
functions

Staff have the right skills,  
experience and behaviours  
to fulfil their position and  
continue to develop with  
opportunities identified



# Expected benefits

The proposed FTS structure along with other initiatives will enhance the efficient and effective delivery of AV's FTS functions. The expected benefits include:

- ▶ Strong, clear leadership and accountability in the development and implementation of innovative, flexible and effective FTS strategies
- ▶ Connecting and strengthening internal structures, responsibilities and processes
- ▶ Establishing clear roles and enhancing simplicity through an organisational structure and operating system that is easy to understand and navigate
- ▶ Continuing to enhance the customer service experience through strong leadership, direction and support
- ▶ Employees have the right skill, experience and behaviours to fulfil their position
- ▶ Development opportunities for staff with clear, progression pathways identified



# Proposed functions

## Financial Transactional Services

### Billing

*Data processing of Patient Care Records (PCRs) for the timely, efficient and accurate billing of AV services*

- ▶ Billing of ambulance services
- ▶ Reporting, compliance & governance
- ▶ Service delivery & performance improvement
- ▶ Systems, frameworks, processes and procedures

### Accounts Receivable Collections

*Timely, efficient and compliant recovery of revenue and debt collection*

- ▶ Revenue recovery & debt collection
- ▶ Hardship assessments
- ▶ Contractual performance for debt collection
- ▶ Reporting, compliance & governance
- ▶ Service delivery & performance improvement
- ▶ Systems, frameworks, processes and procedures

### Accounts Payable

*Efficient and effective payment for authorised goods and services received*

- ▶ Creditor accounts processing
- ▶ Petty cash
- ▶ Reporting, compliance & governance
- ▶ Service delivery & performance improvement
- ▶ Systems, frameworks, processes and procedures





# Proposed key changes

- ▶ Consolidate the three key FTS functions:
  1. Billings
  2. Accounts Receivable Collections
  3. Accounts Payable
- ▶ Establish the interim, fixed-term positions of Manager Billings and Manager Accounts Receivable Collections into permanent, ongoing positions
- ▶ Re-title the current 'Manager Financial Transactional Services' to 'Senior Manager Financial Transactional Services', consistent with Salary Classification titling and descriptors



# Proposed key changes | Accounts Receivable Collections

- ▶ Create a new, permanent ongoing position of 'Advisor AR Accounts Management', responsible for:
  - leading and contributing to AV's debt collection function of commercial accounts and receipting/banking;
  - consumer debt collections managed under contractual agreements with external Debt Collection Agencies; and
  - ensuring daily activities maximise debt recovery/resolution compliant with contractual agreements.
- ▶ Re-title the current 'Accounts Receivable Team Leader' role to 'Team Leader AR Customer Service'
- ▶ To provide further role clarity and delineate between various AR functions, existing Accounts Receivable Officers will be allocated across the following three AR functions following an internal EOI process. All three positions operate at the same level, are equally graded and consist of tasks in the current AR Officer role.
  1. AR Customer Service Officer (Consumer Debtors)
  2. AR Account Management Officer (Commercial & Consumer Debtor)
  3. Banking & Administration Officer

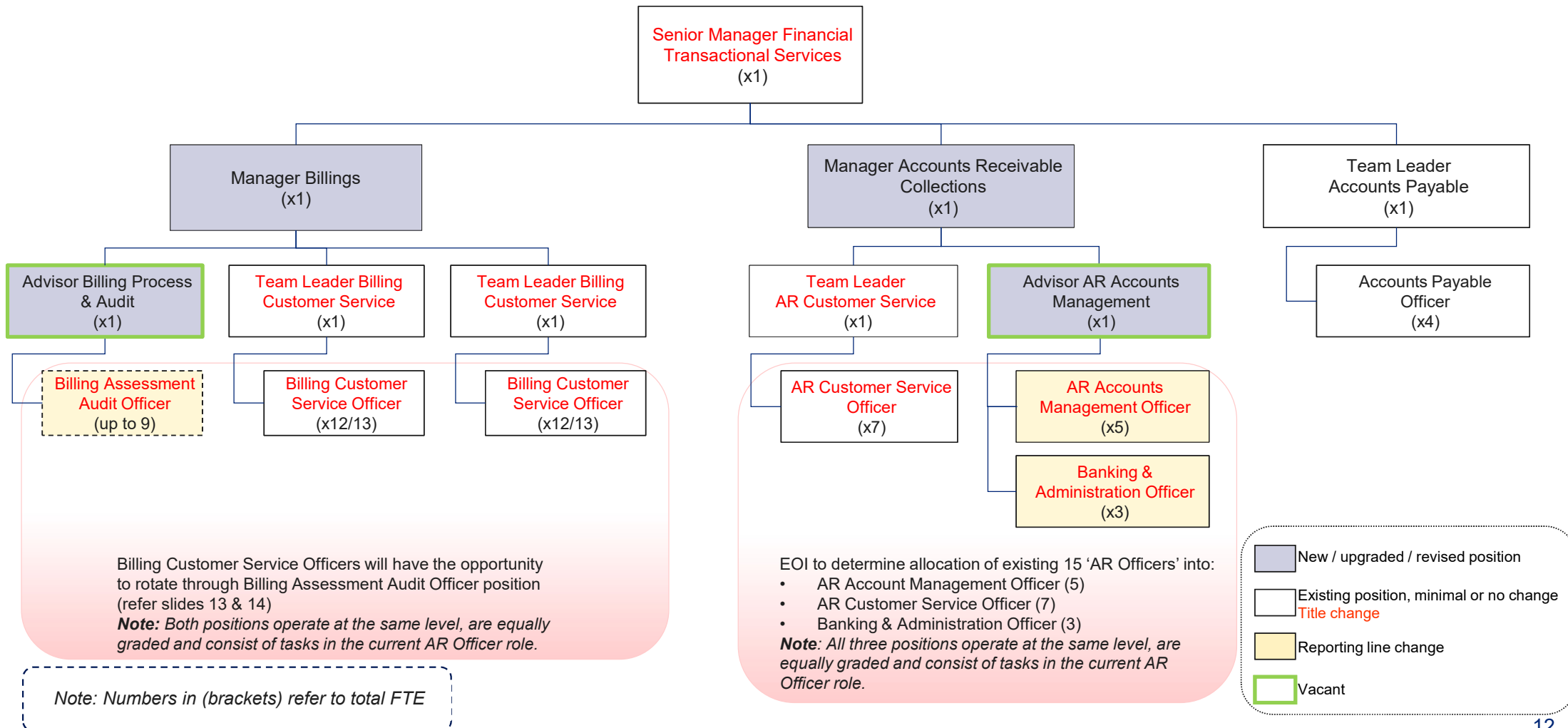


# Proposed key changes | Billings

- ▶ Create a distinctive 'Billing Assessment Audit' function to be undertaken by Billing Assessment Audit Officers
- ▶ Create a new, permanent ongoing position of 'Advisor Billings Process and Audit', responsible for:
  - leading and contributing to AV's billing performance function;
  - supporting the delivery of accurate and efficient billing outcomes and audit requirements for compliance; and
  - identifying opportunities for process improvement through audit processes.
- ▶ Re-title the current 'Billings PCR Team Leader' role to 'Team Leader Billing Customer Service'
- ▶ Re-title the current 'Billing PCR Officer' role to 'Billing Customer Service Officer'
- ▶ Establish a staffing model to provide Billing Customer Service staff the opportunity to rotate through the Billing Assessment Audit Officer role. Both positions operate at the same level, are equally graded and consist of tasks in the current Billing PCR Officer role. This staffing model will:
  - enable Billing Customer Service Officers to build on capabilities and expertise across billing responsibilities focused on compliance and accuracy of billing outcomes
  - support and recognise the importance of an experienced Billing team, contributing to consistency of performance output focussed on compliance and accuracy of billing outcomes
  - reduce disparity between responsibilities, Billing-vs-Audit, as all team members have the opportunity to undertake both roles
  - enable lessons learnt from both streams, generating engagement for continuous improvement and reduces risk of siloed workloads / single focused skills



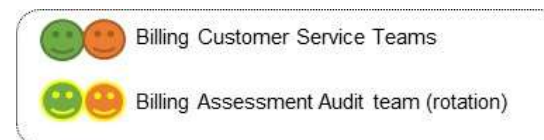
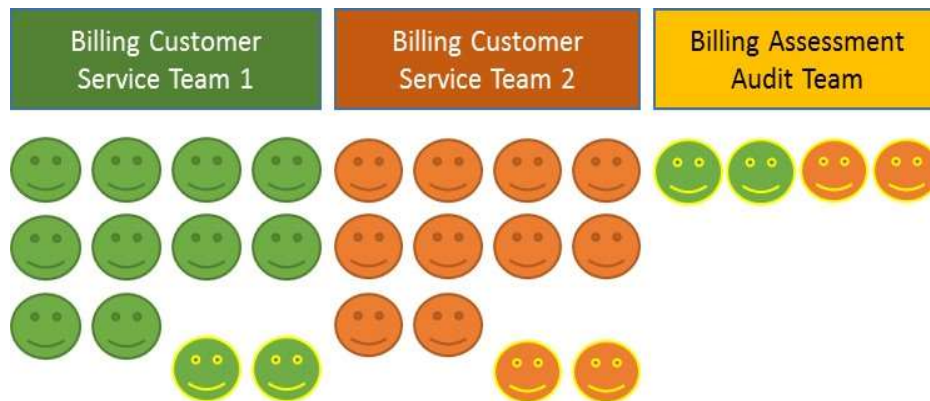
# Financial Transactional Services | Proposed structure



# Proposed Rotation Model | Billing Assessment Audit team

An EOI process will apply to establish the pool of Billing Assessment Audit Officers. This will be a simple, easy to follow process, which will be fair, equitable and transparent in accordance with AV policy.

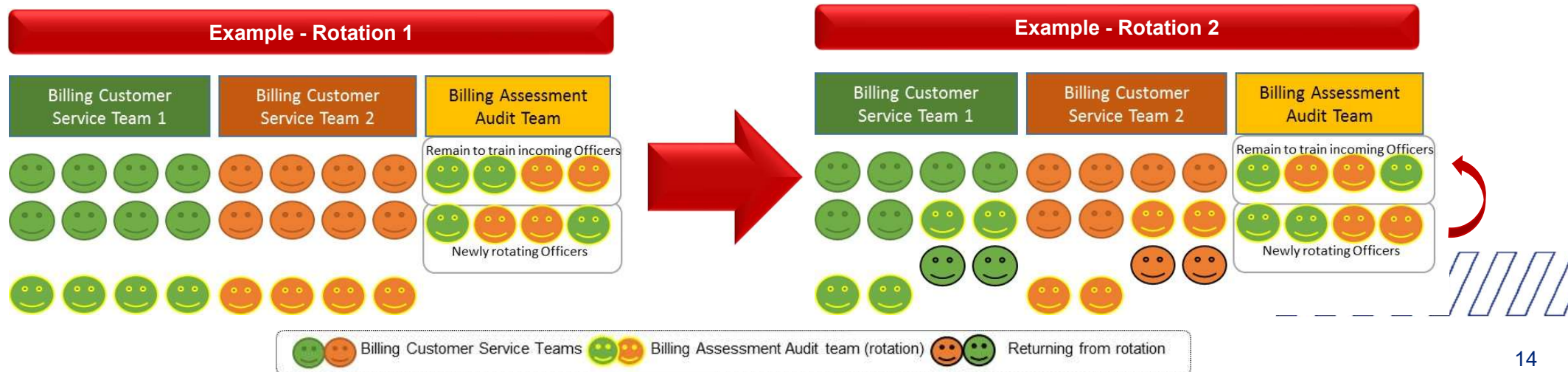
- ▶ The **first 12 months** will focus on setting up the new Billing Assessment Audit function, processes and work instructions
- ▶ To support the establishment of the function, and following an internal and contained EOI process, the Billing Assessment Audit Officers will initially be appointed for a period of 12 months. There will be no rotation within the team during this time. Based on this proposed model, this is what the team will look like:



# Proposed Rotation Model | Billing Assessment Audit team

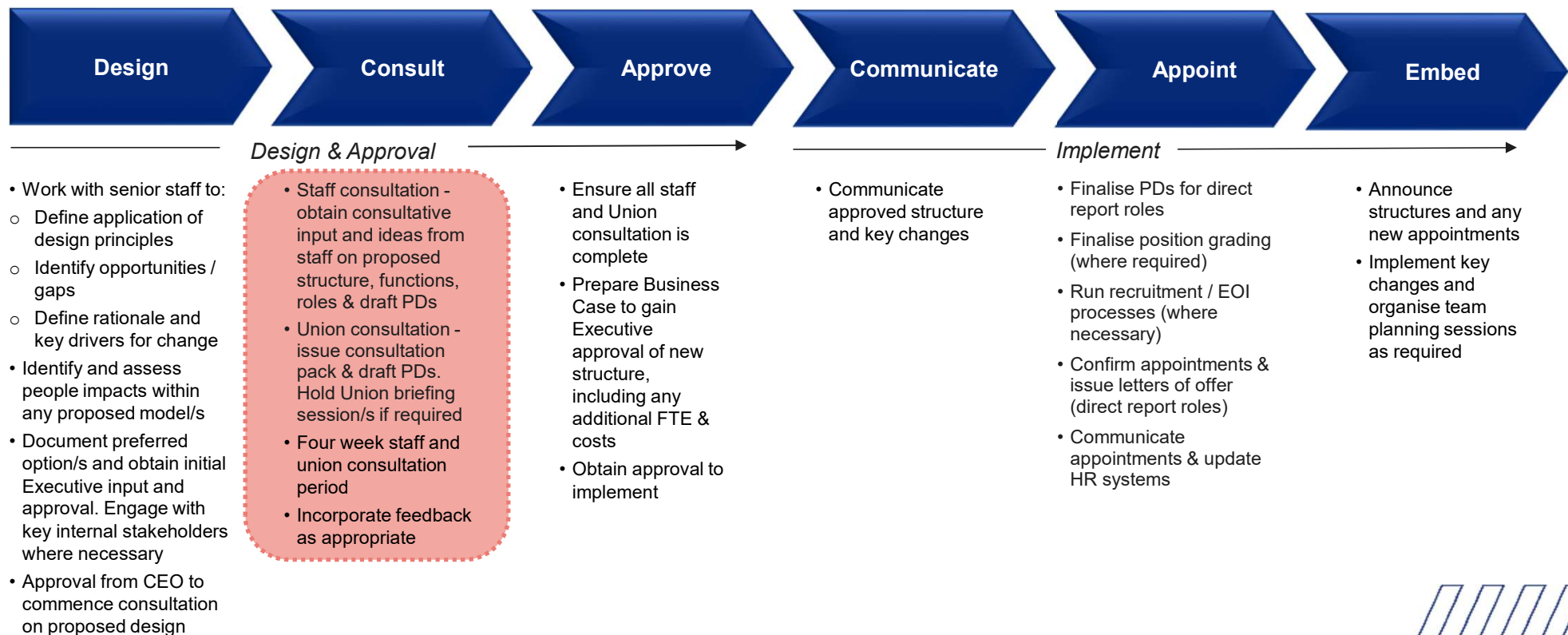
After the first 12 months, rotations from the Billing Customer Service team to the Billing Assessment Audit team will commence.

- ▶ “Rotations” proposed every 8-12 weeks
- ▶ A buddy system will facilitate training and review during the rotation period
- ▶ To maintain stability, a consistent, stable number of experienced Billing Assessment Audit Officers will remain – see example below.
- ▶ Desire for all Billing Customer Service Officers to have the opportunity to rotate through Billing Assessment Audit team



# FTS redesign | next steps

The redesign process involves a series of steps, of which some, but not all, can be done in parallel.



# What does consultation mean?

## Our role over the next 4 weeks...

- Meet with staff & Unions to consult on the proposed structure
- Gather and consider input & feedback received and respond to any specific issues & queries
- Hold additional meetings with staff & Unions as required
- Incorporate further changes into the structure design where appropriate
- Finalise the proposed FTS structure

## Your role over the next 4 weeks...

- Consider the proposed FTS structure, including the Billings rotation system, roles, PDs
- Share your thoughts and provide input & feedback to your Manager, myself or a member of the Organisation Design team at [askAV@ambulance.vic.gov.au](mailto:askAV@ambulance.vic.gov.au)
- Provide any input or feedback on the proposed structure or PDs by COB on **9 April 2021**.





# Next steps & timeline

The key next step in the redesign process is to consult with staff and unions on the proposed structure and seek Executive approval of the final design before implementation begins.



# Discussion, questions and initial feedback...

