Finance Assistant

|  |  |
| --- | --- |
| Job title: | Finance Assistant |
| Department: | Finance |
| Location: | Remote |
| Reporting to: (job title only) | Accounts Receivable Manager/Transactions Finance Manager |
| Direct reports: (job title only) | None |
| Accountable to: (where applicable) | Accounts Receivable Manager/Transactions Finance Manager |
| Responsible to:(where applicable) |  |
| Job purpose: | The purpose of the role is to support the accounts receivable team with analysis, monitoring and collections of revenue. |
| Role and Responsibilities: | **Analysis & Review:*** + Regular analysis & reporting of outstanding debt, rejected charges, DNA’s & outstanding excess fees across the corporate customer base
	+ Monitoring & flagging any unforeseen variances that require a change in actions
	+ Updating any cases/invoices where a customer has rejected a charge and provided a reason for doing this where a correction is required
	+ Collaboration with the Finance, Commercial & Operations team to identify suitable future actions

**Collection of outstanding monies:*** + Where policies have lapsed, a DNA (Did Not Attend) has occurred, or where there is an outstanding excess to be paid, getting in touch with individual service users to take payment
	+ Discussing these matters sensitively, using active listening to alert customers of outstanding/non-payments and the payment options available to them
	+ Negotiating service users to meet their financial commitments to ensure maximum success regarding outstanding fee collections
	+ Billing PMI (Private Medical Insurance) customers
	+ Corresponding with PMI’s to ensure ledgers are accurate and up to date
	+ Management of data to ensure correct information being used for debt collection purposes
	+ Responding to queries received relating to DNA, shortfalls and excesses
	+ Management of regular payment collection links
	+ Allocation of payments received within the finance system
	+ Any other tasks within the accounts receivable team

**Equality Diversity & Inclusion (EDI):**We are proud to be an equal opportunities employer and are fully committed to EDI best practice in all we do.  Vita Health Group has several initiatives in place to achieve this including our Zero Tolerance Policy, Code of Conduct, Freedom to Speak Up Guardians, and more. We believe it is the responsibility of everyone to ensure their actions support this goal with all internal and external stakeholders. * Be aware of the impact of your behaviour on others.
* Ensure that others are treated with fairness, dignity, and respect.
* Maintain and develop your knowledge about what EDI is and why it is important.
* Be prepared to challenge bias, discrimination, and prejudice when possible, and raise with your manager, the EDI & Sustainability team, or the Freedom to Speak Up Guardians.
* Encourage and support others to feel confident in speaking up if they have been subjected to or witnessed bias, discrimination, or prejudice.
* Be prepared to speak up for others if you witness bias, discrimination, or prejudice.
 |
| Clinical Governance:(where applicable) |  |
| Training and supervision: | All training to be provided |
| Additional information: |  |

## Person specification

|  |  |  |
| --- | --- | --- |
|  | **Essential** | **Desirable** |
| **Qualifications** |  |  |
| **Experience** | * Previous experience in an accounts/finance role
* Customer Service
* Experience in composing emails
 | * Experience collecting outstanding payments
 |
| **Skills/knowledge** | * Ability to listen and communicate succinctly and effectively
* IT literate – intermediate level minimum across key Microsoft applications, e.g. Outlook, Excel, Word
 | * Business Central 365
 |
| **Specialist training** |  |  |
| **Personal competencies and qualities** | * Interpersonal skills to engage and develop working alliances with colleagues and patients.
* Evidence of an openness to learning new knowledge and skills.
* Excellent verbal and written communication skills
* An awareness of and commitment to supporting and facilitating diversity and inclusion
* Good organisation skills will be needed to prioritise workload.
* A proactive approach to work.
* Excellent verbal and written communication skills.
* High level of enthusiasm and motivation
* Ability to work individually or within a team and foster good working relationships
* Ability to work under pressure
* Excellent time management skills
 |  |

# Version Control

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Owner: | Human Resources | Review: | Annually | Classification: | 1 (Proprietary) |
| Author: | Human Resources | Version: | V1.1 | Status: | PUBLISHED |
| Date Published: | 03/12/2019 | Code: | TBC |  |  |

|  |  |  |
| --- | --- | --- |
| Version: | Date: | Summary of Changes |
| V1.1 | 03.12.19 | Document copied onto authorised VHG branded Policy Template (original had no coding) |
| V1.2 | 06/08/20 | Updated to include diversity and inclusion statement |
|  |  |  |