**Job title:** Finance Operations Administrator

**Responsible to:**  Credit Control and Billing Manager

**Accountable to:** Financial Controller

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**Our Values**

## Fulfilling Lives is our core purpose

## Every one of us makes a difference is the belief that drives us

## Caring, Passionate and Teamwork are the values that underpin everything we do

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## Job Summary

Excellent communication skills are a prerequisite as the role requires maintaining positive and effective relationships with divisional and finance stakeholders, in addition to Care Home colleagues. The successful candidate will be able to demonstrate the ability to work in a high control environment, focussed on reducing risk to Care UK whilst maintaining lean and effective processes. Operating in a rapidly growing environment they need to be able to welcome and actively participate in the management of change and help drive improved customer service.

### Key Responsibilities

* Raising refunds for residents’ departures and change of funding
* Ensuring the accuracy of customer accounts and all balances reflect the latest transactions
* Ensuring that all transactions raised are approved in accordance with the Authorisation Matrix
* Liaising with customers (including residents relatives) to resolve any account queries and acquire any details that relate to the refund (Bank details etc)
* Liaison with Credit Control team, Billing Team, Cash and Bank Team, Care Homes and Managers
* Work as part of the team and support colleagues where necessary
* This list of key responsibilities is not exhaustive and the post holder may be required to undertake other relevant and appropriate duties as reasonably required

**Here's what you can benefit from working with Care UK:**

* Wagestream – a money management app that gives you instant access to your pay
* Award Winning Care Provider (Residential Care Provider of the Year - Health Investor Awards 2022 & more)
* Long service awards
* Discounted gym membership
* Competitive refer a friend bonus
* GEM Awards - we recognise colleagues who go the extra mile
* Hundreds of online and in-store discounts
* Cycle 2 work scheme
* Annual purchase holiday scheme
* Wellbeing support
* Pension contribution

### Health and Safety

As an employee of Care UK, the post holder has a duty under the Health and Safety at Work Act 1974, to:

* Take reasonable care of the health and safety of themselves and all other persons who may be affected by their acts or omissions at work.
* Co-operate with their employer to ensure compliance with Health and Safety legislation and the Health and Safety policies and procedures of the organisation, not intentionally or recklessly interfere with, or misuse, anything provided in the interests of health, safety, or welfare, in pursuance of any of the relevant statutory provisions.
* To ensure that adequate measures are taken to protect the health and safety of all staff including the maintenance and upkeep of a safe environment.

**Data Protection**

The post holder must at all times respect the confidentiality of information in line with the requirements of the Data Protection Act and the company’s ISO27001 accreditation.  This includes, if required to do so, obtain, process and/or use information held on a computer in a fair and lawful way, to hold data only for the specified registered purposes and to use or disclose data only to authorised persons or organisations as instructed.

* This list of duties and responsibilities is by not exhaustive and the post holder may be required to undertake other relevant and appropriate duties as reasonably required.
* This job description is subject to regular review and appropriate modification.

I confirm I have read and understand this Job Description

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| --- |
| **Name of postholder** |
| **Signature**  |
| **Date** |

##### Person specification

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| **Criteria** | **Essential** | **Desirable** |
| Qualifications |   | * GCSE
* AAT/Finance related qualification
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| Experience | * An appreciation of the impact of billing on the customer
* Experience of managing time effectively, meeting objectives and deadlines
* Experience providing excellent customer service
 | * Previous Sales Ledger knowledge
* Experience within a finance team
* Experience of raising invoices
* Experience in a data entry/administrative capacity
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| **Technical Skills** | * All Microsoft packages including Excel
 | * Experience of Agresso
* Knowledge of CareSys
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| **Personal Qualities** | * Self-motivated and proactive approach to work
* Good communication skills both written and verbal
* Copes well under pressure whilst working to tight deadlines
* Conscientious, high attention to detail with ability to see tasks through to completion
* Methodical, analytical and logical approach
* Able to demonstrate use of initiative
* Confident and able to provide help and support to other colleagues and customers
* Able to maintain privacy and confidentiality
* Commitment to personal development and the acquisition of new knowledge and skills
* Able to maintain privacy and confidentiality
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