

CLINICAL FINANCE ASSISTANT

Key Terms and Conditions of Employment

Purpose of Job: To provide the clinical administration team with sufficient resource to focus on the active management of unpaid clinical invoices and to provide a strong connection between the clinical team and the work of the finance team. The successful candidate will work alongside other members of the clinical administration team, engage with therapists and supervisors regarding unpaid clinical invoices, and assume some direct client engagement activity.

Reports to: Head of Clinical and Project Operations

Works closely with: Therapists, clinical admin team, finance team, sometimes will work with clients responding to invoicing queries.

Location: Currently remote working, but our offices are located in central London

Contract: Fixed term, initially for 3 months

Hours of work: Full time, 37.5 hours per week (Monday-Friday)

Salary: £22-24k per annum, depending on experience and qualifications

Training: Experience of working with Salesforce, Xero and Stripe is desirable, but training will be provided

Holiday: 20 working days plus bank holidays

Pension: Group personal pension scheme
5% employee contribution – 6% employer contribution

Background

Formed in 1948, Tavistock Relationships is internationally renowned as an organisation delivering and developing advanced practice, training, and research in therapeutic and psycho-educational approaches to supporting couples.

We deliver professional training to the next generation of couple therapists and provide clinical services to couples and parents throughout London. We provide a range of counselling and psychotherapy services to a diverse community. Supporting clients experiencing challenges in their relationships, their sexual lives, and their parenting.

In addition, we undertake research, service development and policy activities which encourage the development and growth of effective and innovative relationship support interventions, alongside sharing widely our message around the importance of couple relationships.

Responsibilities

The post holder will:

- In liaison with therapists and the management team, manage and respond professionally to clinical customer invoice queries by both email and telephone.
- Provide accurate financial data with therapists and supervisors by producing timely debt reports in line with agreed reporting periods.
- Proactively support the clinical debt process by monitoring debt levels daily and raising concerns with therapists and supervisors and supporting the implementation of agreed actions.
- Ensure accurate and up to date records are maintained on Salesforce to regarding unpaid amounts and debt chasing activities.
- Review appointments on a daily basis to ensure invoice data on Salesforce is complete prior to data export.
- Take client card payments over the phone (credit card machine or online).
- Ensure aged debt is actively pursued in accordance with debt management procedures, including calling clients regarding payment.
- Support the Clinical Administration and Finance teams with other tasks, as and when required.

Person Specification

Skills and Experience	Essential
	Excellent written and oral communication skills, including telephone manner
	Attention to detail
	Effective time management
	Effective workload management
	Excellent numeracy skills
	Excellent organisational skills
	Ability to build and manage relationships with service users
	Ability to handle sensitive and confidential information
	Ability to work on your own and as part of a team
	Desirable
	Hold a finance qualification, or to be working towards one
	Accounts/credit control experience
	Experience of working with Salesforce, Xero and Stripe