

Credit Control Assistant Volunteer Role Description

Department: Finance	Location: Finance Office
Responsible to: nominated member of Accounts team	Vol Type: Standard
Length of role: Long term	Context: Non people facing

Frequency: Weekly – 1 day per week

Outline of Role:

You will be assisting the Finance Team with raising sales invoices and credit notes for the Fundraising, Finance, Education & Retail teams.

Role tasks:

- Raising sales ledger invoices on a regular basis, and emailing out promptly to customers
- Running aged debtor reports regularly to check for unpaid invoices, and contact customers for an update on payment
- Updating the aged debtor spreadsheet with relevant comments about status of payment
- Liaising with relevant departments regarding sales invoicing and status of payment
- Ensuring that confidentiality and the security of data is maintained at all times
- Carry out any other general office duties as reasonably requested from time to time
- Accessing e-mail for the purpose of chasing or sending invoices to customers.
- Reviewing paper files still kept in office, and archiving or disposing of securely

Skills and Experience Required:

- Basic IT skills are required, for completing mandatory online training
- Basic Excel skills for inputting data
- Familiarity with sales ledger processes and using accounts packages
- A familiarity with office procedures is desirable
- An awareness of the importance of confidentiality and data protection is essential, though training will be given
- Ability to follow instructions and procedures, but willing to seek assistance when needed and remain within the boundaries of the role

Personal Qualities Required:

- Honest and trustworthy
- Attention to detail, with the ability to see a task through from beginning to completion
- A willingness to undertake repetitive, routine tasks
- Able to take instruction and willing to undertake further training if required
- Flexible, and able to respond to change in a positive way

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Learning Needs:

Statutory

Training Module	Method	Renewal
Data Security for Volunteers	e-learning	Annual
Fire Safety Level 1	e-learning	3 Years
Health Safety and Welfare	e-learning	3 Years
ELfH: Equality, Diversity & Inclusion for Volunteers	Volunteer Welcome Session e-learning (45 mins)	3 Years
Hand Hygiene: the basics	Role Induction / Hand Hygiene champion	One-off
Working with Desk Screen Equipment	DSE assessment as part of role induction	One-off

**We anticipate that this learning will take between three and four hours depending on your level of experience in using online platforms. Support is available if you do not have access to a computer at home, or would like assistance in to complete the training. Please contact Voluntary Services for more information*

Mandatory:

Volunteer Welcome Session (2.5 hrs)

Role Induction, including DSE assessment and awareness-raising of local H&S requirements

Any other in-house role-specific training as required

Departmental support:

You will be supported by, and take part in regular one-to-one 'catch-ups', with a nominated member of the Accounts team.

DBS check

A DBS check is not required for this role

Read and agreed by (print name)	
Signed	
Date	