**Job Profile comprising Job Description and Person Specification**

**Job Description**

|  |  |
| --- | --- |
| **Job Title:**  Direct Payments Finance Officer | **Grade**:  SO1 – SO2 |
| **Section:**  ASCPH Finance Business Resources | **Directorate:**  Adult Social Care and Public Health |
| **Responsible to following manager:**  Team Leader – Direct Payments | **Responsible for following staff:**  n/a |
| **Post Number/s:** | **Last review date:** |

**Working for the Richmond/Wandsworth Shared Staffing Arrangement**

This role is employed under the Shared Staffing Arrangement between Richmond and Wandsworth Councils. The overall purpose of the Shared Staffing Arrangement is to provide the highest quality of service at the lowest attainable cost.

Staff are expected to deliver high quality and responsive services wherever they are based, as well as having the ability to adapt to sometimes differing processes and expectations.

The Shared Staffing Arrangement aims to be at the forefront of innovation in local government and the organisation will invest in the development of its staff and ensure the opportunities for progression that only a large organisation can provide.

**Job Purpose**

To provide a responsive and high-quality Direct Payments purchasing, financial monitoring and advice service for the Adults Services ensuring that public funds are used for the purpose that they are provided for.

**Specific Duties and Responsibilities S01**

1. To input data to the social care information system Mosaic, providing timely and accurate recording of Direct Payment services, ensuring service users are set up for payment and are paid promptly and accurately. Regularly updating information sources and prices on systems in a timely way and making appropriate amendments to funding
2. To provide project support for Direct Payment systems and processes.
3. Accurately scrutinise financial information from service users to request new creditors for Direct Payments on both Integra and Mosaic. Initialising and requesting changes to bank details, address changes etc
4. Process regular payment cycles in an accurate and timely manner to ensure that service users have the funding required to purchase their assessed support each month in advance. Delaying payment for irregularities and investigating anomalies.
5. Manage a caseload to carry out financial monitoring of Direct Payment prepaid accounts, auditing bank statements, highlighting issues to care managers and service users and investigating queries.
6. To analyse bank statements and evidence to evaluate the level of risk associated with service users managing their own direct payment. Identifying any safeguarding issues, misuse of funds, non-payment of contribution and gathering evidence to ascertain the facts and resolving any issues.
7. To identify areas of misuse, fraud, or financial abuse and alert relevant social work team and management. Suspend payments where required and it is safe to do so.
8. Based on monitoring outcomes recommend to Social Work Teams if the DP should be third party managed.
9. To initiate debt recovery work where Client Contribution payments remain outstanding, by contacting Service users or their representatives via written communication – letter, email or by phone to discuss
10. To negotiate repayment terms with Service Users, liaison with social work Team, Support Services and Debt Recovery Team to prevent breakdown of the direct payment.
11. To identify and calculate funds to be recouped to the council. Liaising with service user to recover surplus and ensure that they have adequate funds to pay for their support.
12. Maintain up to date knowledge and best practice in relation to all aspects of Direct payments processes.
13. To have a basic understanding of employment law including tax, national insurance, and pension requirements to assist with Third Party payroll queries and funding.
14. To work in partnership with the contracted external third party support providers. Maintaining close, professional working relationships for an efficient and seamless service throughout the customer pathway. Managing queries through to resolution.
15. To promote the uptake of Direct Payment by running regular training and induction courses for new and existing colleagues in Adult Social Services with a view to providing the information and support required to assist them in efficiently navigating the Direct Payment process.
16. Liaising closely with key stakeholders including Adults Care colleagues, external support services and services users to ensure all requirements have been met for packages of care to be put in place.
17. To advise and support managers on relevant matters affecting the service.
18. To work as required in ways that develop good working relations and collaborative arrangements with internal and external stakeholders.
19. Contribute to and provide information required to produce written guidance to be published and used throughout the council.
20. Contributing to the development of information, systems and processes

**Specific Duties and Responsibilities S02**

1. To carry out the duties required at SO1 with minimal supervision
2. Contribute to improving the direct payment process within the SSA contributing ideas to innovatively improve the service/processes. To change and test systems to take account of new legislation including testing and feedback
3. Communicating with service users, their representatives and Social Work managers to discuss complex matters either virtually or in person as required
4. To produce and update public information material e.g. booklets and leaflets.
5. To update policies and procedures and assist management with annual Audit
6. To promote the uptake of Direct Payment by running regular training and induction courses for new and existing colleagues in Adult Social Services with a view to providing the information and support required to assist them in efficiently navigating the Direct Payment process
7. Check and authorise Direct Payment packages of care on Mosaic
8. To attend meetings regularly as a representative of the direct payment team, providing information and support required for the implementation of any projects and ensure the direct payment policies and procedures is adhered to in the execution of any projects
9. Complete monthly Self-Audit of Direct Payment Officers monitoring. Ensuring quality, standards and consistency. Report back to Manager on findings.
10. Investigate complaints, members enquiries and complex customer queries and prepare draft responses for managers.
11. Provide training and inductions to social work staff and new team members. Providing ongoing advice and guidance on the direct payment process.
12. To provide guidance and advice to colleagues, social work staff and other stakeholders in relation to complex case issues
13. To be involved with consultation for changes in policy that may include attending meetings with staff, the public or voluntary sector to present the changes and respond to questions presented.
14. Lead on special projects within the area when required

**Generic Duties and Responsibilities**

* To contribute to the continuous improvement of the services of the Boroughs of Wandsworth and Richmond.
* To comply with relevant Codes of Practice, including the Code of Conduct, and policies concerning data protection and health and safety.
* To adhere to security controls and requirements as mandated by the SSA’s policies, procedures and local risk assessments to maintain confidentiality, integrity, availability and legal compliance of information and systems
* To promote equality, diversity, and inclusion, maintaining an awareness of the equality and diversity protocol/policy and working to create and maintain a safe, supportive and welcoming environment where all people are treated with dignity and their identity and culture are valued and respected.
* To understand both Councils’ duties and responsibilities for safeguarding children, young people and adults as they apply to the role within the council.
* The Shared Staffing Arrangement will keep its structures under continual review and as a result the post holder should expect to carry out any other reasonable duties within the overall function, commensurate with the level of the post.

**Additional Information**

n/a

**Team structure**

**Person Specification**

|  |  |
| --- | --- |
| **Job Title:**  Direct Payment Officer | **Grade**:  S01 – S02 |
| **Section:**  ASCPH Finance | **Directorate:**  Adult Social Care and Public Health |
| **Responsible to:**  Team Leader – Direct Payments | **Responsible for:**  **n/a** |
| **Post Number/s:** | **Last Review Date:** |

**Our Values**

**THINK BIGGER**

**EMBRACE DIFFERENCE**

**CONNECT BETTER**

**LEAD BY EXAMPLE**

**PUT PEOPLE FIRST**

**http://www.richmondandwandsworth.gov.uk/values**

Our Values are embedded across the SSA and throughout all roles and responsibilities at all levels of the organisation. Please [**familiarise yourself with our values**](https://www.richmond.gov.uk/media/afdbdeao/five_values.pdf)as they are an integral part of our recruitment and selection process.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Person Specification Requirements** | | | | **Assessed by**  **A/I/T/C**  **(see below for explanation)** |
| **Knowledge** | **Essential** | **Desirable** | **Assessed** | |
| Knowledge of the types of services commissioned across Social Services in relation to care and support planning and debt collection |  | A & I |  | |
| Knowledge of Direct Payment Legislation |  | A & I |  | |
| Knowledge of financial and process controls |  | A & I |  | |
| **Experience** | **Essential** | **Desirable** | **Assessed** | |
| Experience of prioritising tasks & organising workloads within a busy environment | A & I |  |  | |
| Experience of analysing information and reconciling accounts | A & I |  |  | |
| Finance experience e.g. payments and/or accounts | A & I |  |  | |
| **Skills** | **Essential** | **Desirable** | **Assessed** | |
| Good numeric skills to be able to understand calculations | A & I |  |  | |
| Able to use standard IT packages (Microsoft Office and Outlook) to a high standard | A |  |  | |
| Good customer service skills with the ability to defuse difficult situations | A & I |  |  | |
| Good oral and written skills to provide clear and concise messages | A & I |  |  | |
| **Qualifications** | **Essential** | **Desirable** | **Assessed** | |
| Maths and English GSCE or equivalent | A & C |  |  | |

**A – Application form / CV**

**I – Interview**

**T – Test**

**C - Certificate**