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

**Job Description**

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| **Job Title:** Client Financial Affairs Officer | **Grade**: Scale 5 - SO2 |
| **Section:** ASCPH Finance Business Resources | **Directorate:** Adults Social Care & Public Health |
| **Responsible to the following manager:**Team Leader – Client Financial Affairs | **Responsible for the following staff:**n/a |
| **Post Number/s:** | **Last Review Date**November 2022 |

**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**

This post is part of a Client Financial Affairs Team who deal with financial matters for vulnerable people who lack mental capacity and have no other persons willing or able to act for them. It provides specialist social care services for service users in relation to finances, property, and safeguarding. Acting in the best interest of the person, the role makes decisions on how best to support a person at home or in the community based on their financial situation.

**Specific Duties and Responsibilities scale 5**

1. To make Deputyship applications to the Court of Protection, following procedures, guidance and instructions from the Court of Protection.
2. To make Appointeeship applications to the Department of Works and Pensions (DWP)
3. To fulfil the responsibilities of an appointee once the application is authorised by the DWP.
4. To investigate clients’ confidential financial matters and manage their funds and bank accounts including maintaining sufficient capital for anticipated expenditure.
5. Apply for all state benefits clients may be entitled to with the aim to maximise their income. Monitoring and managing savings threshold limits, communicating with relevant Departments on changes to circumstances
6. To be responsible with opening and closing bank accounts, transfer of funds between accounts, setting up standing orders and making on-line Bank payments for service user bills and charges.
7. Identify and investigate any potential financial abuse or irregularities.
8. Make safeguarding adult referrals as appropriate and assist with safeguarding investigations when required.
9. Where a person resides in the community, consult with companies to ensure that essential bills are received and paid e.g. utilities, council tax. Keeping the client file updated to ensure audit compliance and continuity for service user.
10. Ensure personal allowances are paid by either using a cash card or direct to care/nursing homes for clients in residential care. Ordering pre-paid cards and monitoring spend and re-cooping surplus’
11. Make applications to Housing Benefit and Council Tax departments for exemptions and appeal Housing Benefit and DWP claims that have stopped
12. consider repayment plans for service users who are in debt referring to line manager as necessary
13. To maintain records in the Council’s systems e.g. Mosaic and SharePoint. Reviewing monthly reports to ensure systems are updated, progress is recorded and visible for Social Workers
14. Make applications to Housing Benefit and Council Tax departments for exemptions and appeal Housing Benefit and DWP claims that have stopped
15. To assist in the preparation of Office of the Public Guardian accounts and reports
16. To ensure that the services for both Councils are dealt with on an equitable basis to deliver the standards required for each, as agreed annually by the Executives of both Councils.
17. To contribute to performance review and improvement measures on an ongoing basis, helping to ensure that a customer focus is embedded within the function and innovative and creative solutions are evaluated to securing the highest quality and value for money function.
18. To contribute as required to change programmes within the service
19. To work in ways that develop good working relations and collaborative arrangements with internal and external stakeholders.

**Specific Duties and Responsibilities scale 6**

1. To carry out the duties required at Scale 5 with minimal supervision.
2. To assist in making S46 funeral arrangements in line with [Public Health (Control of Disease) Act 1984](https://www.bing.com/ck/a?!&&p=35a8bd178757744fJmltdHM9MTY2OTkzOTIwMCZpZ3VpZD0zNzE4MzA4ZS04ODZhLTZkODgtMzdhNC0yMmQyODlhMTZjNjMmaW5zaWQ9NTE4OQ&ptn=3&hsh=3&fclid=3718308e-886a-6d88-37a4-22d289a16c63&psq=S46+funeral+arrangements&u=a1aHR0cHM6Ly93d3cubGVnaXNsYXRpb24uZ292LnVrL3VrcGdhLzE5ODQvMjIvc2VjdGlvbi80Ng&ntb=1) legislation. Including consulting with Coroners, NHS Mortuary staff, family and friends and Registrars.
3. Ensuring that Next of Kin are located, investigating systems and referral to tracing agents. Following inheritance law and obtaining the correct legal documentation before releasing of any estate held. Advising executors and administrators of the estate of any debt outstanding.
4. To do joint visits to care homes and service users in the community to obtain financial information and ensure that the Deputy responsibilities are adhered to,
5. To manage the disposal of all property for council residents who pass away and have no relative or agent to do this.
6. To provide effective Protection of Property services (i.e. to secure client’s property and organise accommodation for animals in the event of emergency) and similar functions required under the National Assistance Act 1948.
7. To advise managers on relevant matters affecting the service and service users

**Specific Duties and Responsibilities scale SO1**

1. To be fully competent at carrying out all aspects of the team’s work with limited supervision.
2. To provide training and coaching to new members of staff.
3. To provide training to internal departments and external organisations.
4. To ensure that all information (e.g. booklets and online) for the area are kept up to date and factual
5. To maintain a thorough knowledge of Adult Social Care legislation including benefits, Appointeeship and Deputyship, inheritance and S46 public health legislation

**Specific Duties and Responsibilities scale SO2**

1. Undertake all the above tasks with minimal supervision / input from line managers
2. To agree repayment plans for service users who are in debt
3. Take responsibility for complex casework including independent decision making and thorough knowledge of policy and procedures in relation to Client Affairs
4. To provide guidance and advice to colleagues, social work staff and other stakeholders in relation to complex case issues
5. Investigate complaints, members enquiries and complex customer queries and prepare draft responses for managers.
6. To update policies and procedures and assist management with annual Audit
7. Communicating with service users, their representatives and Social Work managers to discuss complex matters either virtually or in person as required.
8. 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.
9. To be fully involved with the introduction of new systems or the upgrading of existing systems including testing and providing feedback.
10. Maximised fees for Court of Protection and Office Public Guardianship case management, funeral and property storage recharges
11. 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, 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 profile is not intended to be an exhaustive list of duties the post holder will carry out. Other reasonable duties commensurate with the level of the post, including supporting emergency and priority situations, will form part of the role.

**Person Specification**

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| **Section:** ASCPH Finance Business Resources | **Directorate:** Adult Social Care and Public Health |
| **Responsible to the following manager:**Team Leader – Client Affairs Team | **Responsible for the following staff:**N/A |
| **Post Number/s:** | **Last Review Date:**December 2022 |

**Our Values and Behaviours**

The values and behaviours we seek from our staff draw on the high standards of the two boroughs, and we prize these qualities in particular:

**Being open.** This means we share our views openly, honestly and in a thoughtful way. We encourage new ideas and ways of doing things. We appreciate and listen to feedback from each other.

**Being supportive.** This means we drive the success of the organisation by making sure that our colleagues are successful. We encourage others and take account of the challenges they face. We help each other to do our jobs.

**Being positive.** Being positive and helpful means we keep our goals in mind and look for ways to achieve them. We listen constructively and help others see opportunities and the way forward. We have a ‘can do’ attitude and are continuously looking for ways to help each other improve.

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| **Person Specification Requirements – Assessed by:****A – Application form/ CV****I – Interview****T – Test****C – Certificate** |
| **Knowledge** | **Essential** | **Desirable** | **Assessed** |
| Knowledge of Appointeeship and Deputyship legislation |  | A & I |  |
| Knowledge of Payments IT processes and payment controls |  | A & I |  |
| **Experience**  | **Essential** | **Desirable** | **Assessed** |
| Experience of dealing with vulnerable people |  | A & I |  |
| Ability to deal with complex issues methodically and strategically  | A & I |  |  |
| Significant experience of using standard IT packages and ability to support others in their day-to-day use | A & I |  |  |
| **Skills**  | **Essential** | **Desirable** | **Assessed** |
| Ability to organise and prioritise own workload, to work under pressure and meet deadlines | A & I |  |  |
| Good standard of both written and oral communication skills | A & I |  |  |
| Ability to follow procedures, controls, and instructions | I |  |  |
| **Qualifications**  | **Essential** | **Desirable** | **Assessed** |
| Educated to GSCE standard or equivalent | A & C |  |  |