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

**Job Description**

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| **Job Title:** Document Management Officer | **Grade**: Scale 2 – Scale 6  |
| **Section:** IT | **Directorate:** Resources |
| **Responsible to following manager:**Document Management Team Leader | **Responsible for following staff:** |
| **Post Number/s:** | **Last Review Date** Nov 2018 |

**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:**

Responsible for ensuring all documents received electronically or by hardcopy are securely handled, and original documents returned to customers and are correctly processed in accordance with the Principal of the General Data Protection Regulation Act; Freedom of Information Act and other legislative requirements and fast tracked for further processing via the Document Workflow system to the appropriate service area.   Maintaining the secure keeping of all hardcopy data, and the secure destruction of hardcopy data held in accordance with data destruction Policy and procedures.

**Specific Duties and Responsibilities:**

1. On a daily basis working independently or in collaboration with colleagues when receiving incoming post, historical, hardcopy and electronic documentation and to prepare, classify and prioritise all documents for the Document Management System and to participate in the collection and despatch of all relevant mail.
2. When required monitor, manage and download, print and prepare received electronically through the governments Planning Portal or other portals; adjust the application document details on the Council’s website as necessary which may require redaction of sensitive information.
3. To scan the documents utilising all functions of the software to ensure the highest quality images are available for use, annotating documents as necessary and carry out detailed checks on documentation at all times to ensure information integrity.
4. To ensure the routine maintenance of image scanners and associated equipment are completed on a daily and ad-hoc basis, reporting faults detected on any of the document management systems and or scanners and to carry out follow up action in liaison with or escalating to the Document Management Team leader
5. To index the images, making enquiries of the business application computer systems as necessary, ensuring that all aspects of the work are dealt with accurately, in accordance with departmental targets/SLAs, relevant legislation, procedures, working practices and to defined quality controls.
6. To verify original documents, recording receipts in the document management system and ensuring safe returns; inclusive of valuables via recorded or special delivery to customers as defined in the agreed SLA.
7. Responsible for the retrieval of archived documents under the General Data Protection Regulation, Freedom of information or other legislative requirements and as requested by internal or external customer/stakeholders and the preparation of such documents for destruction as appropriate within stipulated timescales and liaison with storage contractors as required as appropriate.
8. Effectively communicates in writing, verbally, or face to face with customers or colleagues, regarding document management enquiries or complaint resolution; resolving issues that may have occurred.
9. To assist the Document Management Team Leader in the compilation of reports and statistical information relevant to the performance of the document management combined service.
10. To maintain skills and knowledge of each business unit and to participate in and undertake any personal training and development as required, and to support the training and mentoring of colleagues as required.

**Progression Criteria**

Progression through the link grade will be considered by the management team based on both the achievement of continuous statistical performance against benchmarks regarding the quality and quantity of work flow and the officer’s ability to undertake all the duties of the post as outlined below:

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| **Scale 2** | Must have the ability to work within a Document Management environment and be able to be to perform duties of the post with day-to-day input from the Document management Team Leader or more senior officers. Will be capable to perform most delegated duties for each business unit, work on own initiative and demonstrate an appreciation of customer care. |
| **Scale 3** | Must experience within a Document Management environment and be able to be to perform duties of the post with day-to-day input from the Document management Team Leader or more senior officers. Will be able to perform most delegated duties for all business units, work on own initiative, prioritise own workload and demonstrate an appreciation of customer care. |
| **Scale 4** | Must have relevant experience within a Document Management environment and be able to perform the full duties of the post with occasional input from the Document management Team Leader. Will be able to prioritise own workload and support the development of colleagues. Post-holder will also take ownership of issues, dealing with service users or other stakeholders with an appropriate level of customer care. Must be able to assist the Document Management Team Leader in responding to hardcopy retrieval requests under General Data Protection Regulation and Freedom of Information Act by the compilation of hardcopy documents, and Document Search requests from service users. |
| **Scale 5** | Must have significant experience within a Document Management environment and be able to perform the full duties of the post. Will prioritise own workload, and support colleagues with regard to their workload priorities. Post-holder will also take ownership of issues, dealing with service users or other stakeholders with an appropriate level of customer care. Will regularly assist the Document Management Team Leader in responding to complex hardcopy retrieval requests under General Data Protection Regulation and Freedom of Information Act by the compilation of hardcopy documents, Document Search requests from service users and customers and general enquiries from business units. |
| **Scale 6** | Must have significant experience within a Document Management environment and be able to perform the full duties of the post. Will prioritise own workload, and support colleagues with regard to their workload priorities. Post-holder will also take ownership of issues, dealing with service users or other stakeholders with an appropriate level of customer care. Will be able to deal with enquiries and/or complex hardcopy retrieval requests. Will routinely assist the Document Management Team Leader in staff training, responding to customer complaints, data protection breaches, and the compilation of reports, statistical information relevant to the performance of the document management combined service as and when required.Will deputise for the Document Management Team Leader when required. |

**Generic Duties and Responsibilities**

* To contribute to the continuous improvement of the Boroughs of Wandsworth and Richmond services.
* 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 work 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 the both Council’s duties and responsibilities for safeguarding children, young people and adults as they apply to your 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**

* Responsible for handling cash, cheques and direct debits and valuable documents received through the mail service, storing securely until processed. Required to lift hardcopy documents storage boxes in accordance with manual handling procedures as part of the destruction process as appropriate.
* To maintain confidentiality and undertake all duties and inter-actions with staff, partner providers and customers fairly, without unlawful discrimination and with due regard to all Councils policies including Equality and Diversity in Employment and Service Delivery Policy, General Data Protection Regulation, Freedom of Information Act, Safe Guarding Vulnerable Adults and Young persons and Children.

*The duties and responsibilities outlined in this job profile are indicative of the role,*

*however, they are not exhaustive and may be subject to change.*

 *In addition, you will be required to undertake other reasonable duties as directed by your manager.*

**Current team structure**

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**Person Specification**

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**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 &** I**/ T/ C (see below for explanation)** |
| **Knowledge**  |
| An understanding of Document Management and or Workflow Processes or a willingness to learn. | A/I |
| An understanding of General Data Protection Regulation, Freedom of Information Act | A/I |
| Safeguarding Adults & Young Persons, Court Evidence Admissibility processes. | A/I |
| **Experience**  |
| Experience of working to demanding timescales and dealing with large volumes of documents to defined procedures and service level agreements. | A/I |
| Intermediate experience of using I.T systems including Microsoft Office, document imaging systems (Preferably IDOX, Anite and Civica W2). | A/I |
| **Skills**  |
| An ability to communicate confidentially both orally and in writing responding to customer, colleagues, stakeholder’s enquiries and or complaints. | A/I |
| Perform a variety of clerical and technical support tasks including data entry, document preparation and scanning. | A/I |