

## Job Profile comprising Job Description and Person Specification

### Job Description

<b>Job Title:</b> Data and Finance Casework Assistant	<b>Grade:</b> Scale 6
<b>Section:</b> Special Needs Assessment Service	<b>Directorate:</b> Children’s Services
<b>Responsible to following manager:</b> Senior Case Manager	<b>Responsible for following staff:</b> NA
<b>Post Number/s:</b>	<b>Last review date:</b> August 2019

#### 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.

1. To provide key support to the administration of the procedures under the Children and Families Act 2014 for the Education, Health and Care (EHC) Needs Assessment of children and young people with special educational needs, the issuing of EHC Plans and ongoing annual reviews.
2. Works as part of one of 3 teams each with a Casework Assistant (CWA), a Data and Finance CWA and either a Senior Case Manager or the Deputy Head of SNAS, with responsibility for administering key elements of the statutory processes and for managing all the core administrative functions of the team as well as the wider service, as needed.
3. Responsible for the provision of a range of data in relation to the EHC process and placements of pupils with EHC Plans including quarterly Council performance indicators, ensuring that the deadline for these is met.

4. Prepares draft responses to a range of Freedom of information requests in relation to the EHC process and placements of pupils with EHC Plans ensuring that the deadline for these is met.
5. Contributes to the production of statutory annual returns to the DfE including the SEN2 and Alternative Provision Census ensuring that the deadline for these is met.
6. Supports Case Managers in ensuring that Finance Notification forms are completed for pupils placed in independent school and college placements and that the Placements model is updated for all other placements and support, ensuring that these are done promptly and accurately.
7. Makes payments to a range of education providers currently including out-borough schools, tuition agencies and alternative providers, ensuring that payments are made promptly and accurately. Makes other payments such as for items of equipment for individual pupils and termly travel assistance budgets, ensuring that these are made promptly and accurately.
8. Ensures that information is provided to the Head of SNAS to support requests for information about current commitments and payments made, in particular to support budget forecasting.
9. Contributes to ensuring that service documents are kept up to date and are accessible to all staff and provides information and training to new staff on these.
10. Acts as the key contact for issues relating to the Capita system and advises other staff in relation to this.
11. Acts as the first point of telephone contact for a wide range of complex calls from parents, schools and professionals seeking information about individual cases and general advice and exercises a significant degree of discretion in dealing with these as far as possible without referral to the relevant Case Manager. This will involve giving advice to parents who may be distressed or angry, where tact and sensitivity will be needed at all times.
12. Has contact with a wide range of other officers and professionals from both inside and outside the Department and the Council, including the Wandsworth Information, Advice and Support Service, the Schools' and Community Psychology Service, Social Care teams, Pupil Services, the Inclusion Service, Health Service professionals, Headteachers and SENCOs.
13. Deals with unplanned interruptions to the daily workload and conflicting priorities, in a complex area of front-line service delivery where urgent individual pupil issues can arise unexpectedly.

14. Creates and updates children's records on Capita/Mosaic and ensures that data is accurately inputted. Generates and despatches letters to parents and professionals as part of the EHC Needs Assessment process. Ensures that all written professional advice for the EHCNA is received and logged as part of this. Sends out chase letters to professionals where they have not submitted their reports on time.
15. Sends out draft and final EHC Plans to parents and photocopies/scans these for schools and professionals, as required. Photocopies and sends out/scans and emails draft Plans for school consultations as required. Chases responses to draft Plans from parents and consultation responses from schools, including direct liaison with the Headteachers of in and out borough and independent schools.
16. Assists in setting up transport for individual pupils in liaison with the Transport section, ensuring the necessary arrangements are in place for the pupil's start date and acts as first point of contact from parents and the Transport section in relation to any ongoing queries.
17. Provides support for the annual review process, including chasing and receipt of annual review reports from schools. Checks whether further action is required and either issues a no change letter to parents or passes the report to the relevant Case Manager for further action.
18. Assists in organising SEN, EHCNA and Complex Needs Panel meetings ensuring that dates are set, Panel members and Headteacher and parent representatives are notified, rooms booked and catering supplied. Types up agendas based on cases received from Case Managers and circulates these and Panel papers by scanning and emailing or photocopying and sending out hard copies, as appropriate.
19. Assists with Access to Records requests ensuring that papers are provided to the Departmental contact by the relevant deadlines.
20. Assists in ensuring that school leavers are identified at the end of each school year and that schools are contacted to check pupils' future plans and maintains leavers' records.
21. Contributes to and attends, where required, two sessions per year for parents about the secondary transfer process.
22. Undertakes other duties, commensurate with the grade and title of the post, as required by the Senior Case Manager and/or Deputy/Head of SNAS.
23. Ensures that the line manager is made aware and kept fully informed of any concerns in relation to safeguarding and/or child protection
24. Generally, promotes the services of the department by assisting the public in person or by telephone in a helpful and courteous manner.

25. Carries out all duties in accordance with the Equal Opportunities policy with respect to the staff and public, actively promoting equality and seeking to prevent and overcome disadvantage and discrimination.

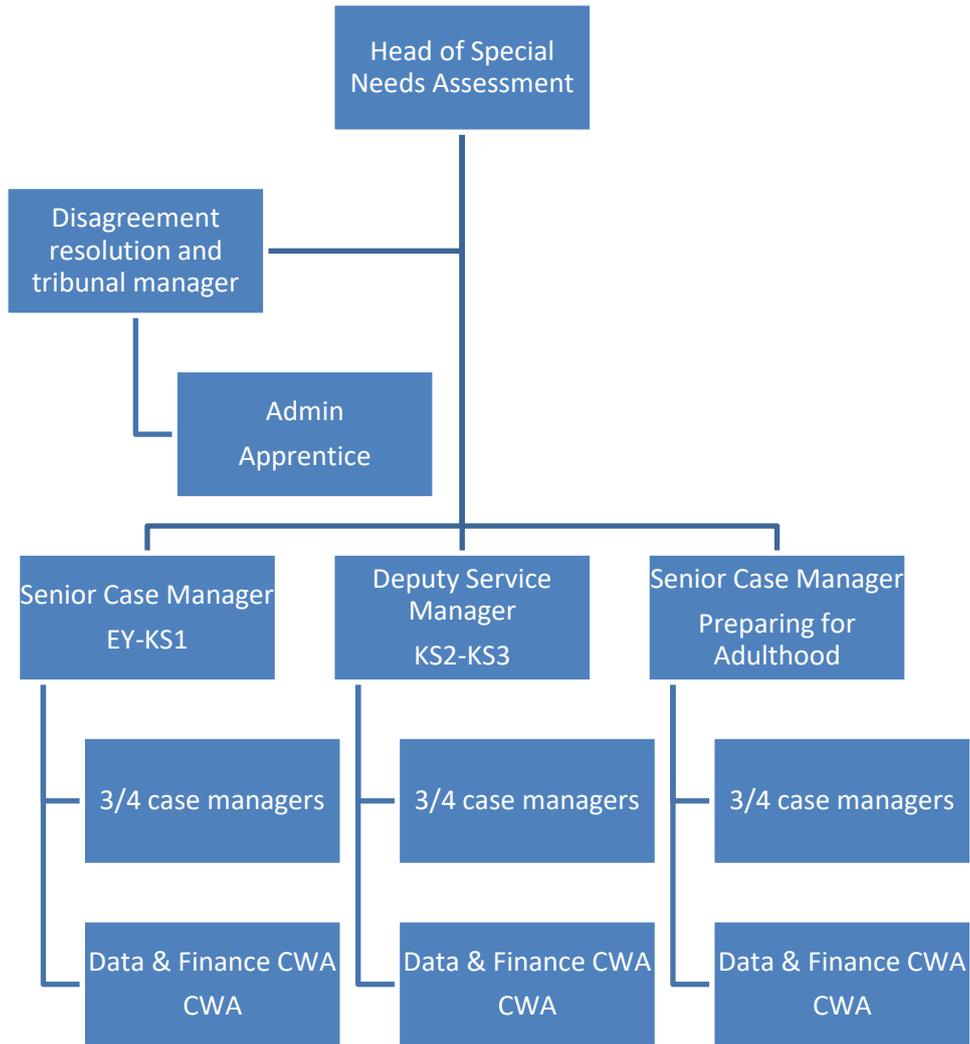
### **Generic Duties and Responsibilities**

- 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

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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.

Person specification requirements	Assessed by A/ I / T/ C
<b>Knowledge</b>	
1. Knowledge of special educational needs with a keen desire to learn more.	A, I, T, C
2. Understanding of the importance of equal opportunities.	
3. Understanding of the importance of customer care.	
<b>Experience</b>	
4. Awareness of confidentiality issues and proven ability to deal with confidential matters.	A & I
5. Experience of using e-mail and the internet.	A & I
6. Experience of working as part of a diverse team in a busy office environment.	A & I
7. Experience of working in an Education, Social Services or Health setting.	A & I
<b>Skills</b>	

8. Good level of computer and IT literacy including ability to produce standard letters using Microsoft Word and PDF; proficiently use a database (Mosaic & Capita) scan and upload documents	A, I, T
9. Ability to organise, prioritise and maintain resilience while working under pressure.	A, I, T
10. Ability to analyse and produce a range of data, to produce accurate financial information and to make payments.	A, I, T
11. Ability to communicate well with a wide range of people both over the phone and face to face and provide appropriate information to sometimes distressed callers in a confident manner.	A & I
12. Ability to work without supervision and use initiative when appropriate and to provide guidance and support to other staff.	A & I
13. Ability to pro-actively respond to queries and take appropriate action.	A & I
14. Conscientious with thorough attention to detail ensuring that information is accurate	A & I
15. Good levels of numeracy and literacy.	A, I, T, C
<b>Qualifications</b>	
16.	
17.	

**A – Application form / CV**

**I – Interview**

**T – Test**

**C - Certificate**