

## **OLDHAM COUNCIL**

### **JOB DESCRIPTION**



<b>Job Title:</b> Client Finance Officer	
<b>Directorate:</b> Health and Wellbeing	<b>Division/Section:</b> Adult Social Care – Business Management & Transformation
<b>Grade:</b> Grade 5	<b>JE Reference:</b>

#### **Job Purpose:**

To hold a complex case load of appointeeship and deputyship cases managing and protecting the finances of service users and vulnerable adults, supporting the delivery of a high quality, cost-effective money management service.

To complete financial assessments to calculate service users contributions towards social care services, being responsible for complex cases including deferred payments and issues of deprivation.

To support the Directorate to maximise its income from social care and other related charges.

To offer support and advice on client finance matters.

#### **Key responsibilities**

##### **Case Management**

1. Manage a complex and challenging caseload, taking responsibility and ownership to ensure all cases are proactively progressed in accordance with Court of Protection, DWP, service targets and deadlines
2. Act in the best interest of the service user, coordinate and gather information, and liaise with all relevant 3<sup>rd</sup> parties, to ensure all queries and problems are satisfactorily resolved and that they support decision making.
3. Undertake protection of property visits, keeping a detailed inventory and robust recording, ensuring the safekeeping and safe return of client property/valuables in a timely manner and in accordance with the council policy
4. Update all IT (and other) systems in a timely manner, complying with all service, Court of Protection and DWP standards, including financial, social care and casework systems.
5. Keep customers and other relevant parties regularly updated, ensuring all written communications follow corporate procedures and are easily understood, accurate, and sensitive to individual circumstances.
6. Provide specialist technical advice, guidance and support to other staff, clients, Council officers and others, regarding financial assessment regulations, Court of Protection and DWP legislation.
7. Keep up-to-date with relevant legislative, policy or other changes to ensure the continuing delivery of high quality casework.

8. Undertake comprehensive checks to ensure clients are in receipt of all relevant pensions, benefits and other financial entitlements. Ensure relevant applications and reviews are undertaken on behalf of clients, liaising with others and referring where appropriate, to welfare benefit and debt advice specialists.

9. Escalate any safeguarding concerns to your Line Manager, gathering information as directed to assist with any safeguarding investigations. Attending safeguarding meetings where required.

### **Financial Assessments**

1. Undertake accurate and timely financial assessments for social care customers in a range of settings, gathering and verifying evidence, and liaising with others as required e.g. family members, social care providers, Department for Work and Pensions, Care Managers.

2. Ensure all financial assessments are undertaken in accordance with legislative requirements, national guidance, Council policy and service procedures.

3. Manage the deferred payments scheme, monitoring and reviewing cases as appropriate ensuring that reports are kept up to date, charges are raised and statements are issued in line with policy.

4. Gather, validate and analyse evidence from a range of sources, to enable fully informed decisions to be made on requests for formal reviews and appeals of financial assessments and budget planning.

5. Ensure the accurate reconciliation of client accounts on a monthly basis, investigating discrepancies, and escalating any issues as necessary to your line manager.

6. Attend safeguarding and best interest meetings to provide support on individual cases.

7. Update and manage data as required to produce and support accurate reports and monitoring.

### **General**

1. Maintain accurate and up-to-date records (electronic and manual) in accordance with service standards, policies and procedures.

2. Proactively identify practice and procedural improvements to enhance efficiency and customer service. Help develop and keep up-to-date relevant policies and procedures, supporting their effective implementation.

3. Actively participate in your own 1-2-1, supervision, appraisal and learning and development sessions with your line manager.

4. Actively promote and apply the Council's Equalities and Diversity agenda and adhere to the Council's Customer Care standards

6. Adhere to health and safety, data protection, employee conduct, information security, and all other policies of the Council and your service area.

7. Attend local, regional or national meetings as required.

8. Provide cover for colleagues as directed, in order to ensure performance targets are met.

9. To undertake such other appropriate duties as may be assigned by your supervisor or line manager

**Contacts:**

Other team members, Managers, other Council Officers, external agencies (including the NHS, DWP and other Government Departments), Social Care clients (and their family members, carers, or legal representatives), social care providers, the general public.

**Relationship To Other Posts In The Department:**

**Responsible to:** Client Finance Manager

**Responsible for:** N/A

**Special Conditions:**

DBS disclosure – enhanced  
Essential Car Allowance - access to a vehicle, insured for works purposes

	DATE	NAME	POST TITLE
Prepared	August 2017	Kirsty Littlewood	Head of Service
Reviewed			
Reviewed			
Reviewed			

**OLDHAM COUNCIL****PERSON SPECIFICATION****Job Title:** Client Finance Officer

	<b>Selection criteria (Essential)</b>	<b>Selection criteria (Desirable)</b>	<b>How Assessed</b>
<b>Education &amp; Qualifications</b>	Literacy and numeracy sufficient to undertake the tasks and duties contained in the Job Description.		AF/T
<b>Experience</b>	<p>Considerable experience of working with financial systems, records and undertaking complex financial assessments.</p> <p>Considerable experience of using spreadsheets, word processors, and a range of computer applications</p> <p>Considerable experience of providing services to vulnerable people</p> <p>Experience of supporting/guiding others</p>		<p>AF / I</p> <p>AF / I</p> <p>AF / I</p>
<b>Skills &amp; Abilities</b>	<p>Ability to manage significant competing demands on your time, working to challenging targets and deadlines</p> <p>Ability to manage a complex caseload, maintaining high quality standards at all times</p> <p>Ability to maintain clear and accurate financial and casework records (electronic and manual)</p> <p>Ability to undertake complex mathematical calculations</p> <p>Ability to act independently, dealing with complex matters, without frequent reference to managers</p> <p>Excellent customer care, interpersonal and communication skills, sufficient to provide a sensitive and personalised service to clients and to maintain good working relationships with others</p> <p>Ability to influence and negotiate with others</p> <p>Excellent IT skills, sufficient for effective electronic document management, producing high quality reports, and providing statistical information</p>		<p>AF / I</p> <p>AF / I</p> <p>AF / I</p> <p>AF / T</p> <p>AF / T</p> <p>AF / I</p> <p>AF / I</p> <p>AF / I/T</p>

<b>Knowledge</b>	Comprehensive knowledge of financial assessment and charging regulations, case law, guidance and policy		AF / T
	Comprehensive knowledge of Court of Protection and Corporate Appointeeship legislation, case law, and policy		AF/T
	Comprehensive knowledge of welfare benefits and awareness of debt recovery procedures		AF/I
	Knowledge of customer care principles		AF/I
	Understanding of the context of working in local government		AF/T
	Knowledge of the Mental Capacity Act, social model of disability and the range of social care provision available		AF/I
<b>Work Circumstances</b>	Willing to work flexibly to meet the demands of the service		AF / I
	Willing on occasions to work outside office normal hours as required to meet the needs of the service		AF
	UK Driving Licence free from significant endorsement		

*Abbreviations:* AF = Application Form; I = Interview; T = Test; R = References;

**NB. - Any candidate with a disability who meets the essential criteria will be guaranteed an interview**