

Job specification



Job title: Appointeeship Audit Officer

Service: Appointeeship and Support Service

Grade: G6

Reporting to: Appointeeship Team Manager

Your job

This role is part of the Appointeeship and Support Services team which is specifically responsible for providing financial support to individuals who have an identified need. Ensuring personalisation underpins the approach of the team.

You will support Appointeeship Management, Corporate Appointees and the Appointeeship Finance Officer to maximise, manage and maintain all benefits for their allocated caseload of clients.

You will monitor Wigan Council's Appointeeship suite of banks accounts via report for any unusual activity and Prepayment card creation and activation.

You will also monitor the debt report, as well as savings levels against any debt that a client has to Wigan Council, ensure direct debits are set up for ongoing charges, payment plans are in place against any legacy debt and report your findings to the appointee.

You will complete ad-hoc financial checks from a client's appointeeship bank accounts, Prepayment Cards to prepayment cards and payment of invoices. You will monitor transactions over the relevant threshold against managerial authorisations.

You will also complete adhoc checks against cash deliveries to clients in the community who receive support with their finances via a Care Provider. You will ensure relevant checks have been approved and signed off by the Appointee. You will report your findings to the Appointeeship Team Manager for any necessary action.

You will run monthly reports to assess whether annual reviews have been completed in relation to utility charges and My Life My Money reviews on behalf of Appointeeship clients and report your findings to the Appointeeship Team Manager for any action required.

You will ensure all supporting documentation relating to Appointeeship expenditure has been retained in line with the Council's retention policy for this area of work. You will report your findings to Appointeeship Team Management to enable them to progress down the appropriate route in line with the Appointeeship Financial Procedures.

This is a demanding operational service where smart and agile working is encouraged.

The Council is committed to complying with the European General Data Protection Regulations (GDPR) and meeting the requirements of the Information Commissioner's office (regulating data protection compliance in the UK). It is your responsibility to ensure that the work you undertake is compliant with the General Data Protection Regulations.

In this job you will

In the next 12 months, you will:

- Develop reports with support from Appointeeship Team management and IT Support to enable you to carry out this role as effectively as possible.
- Set up effective working relationships with Care Providers and Social Care.
- Set up an annual plan of works with support from Appointeeship Team Management.
- Support with the set up of Casper the Financial Management reconciliation software.

On an on-going basis you will:

- Maintain effective reports to effectively support the appointeeship Team
- Liaise with wider teamstend partners to establish robust money management audit processes and protect the financial interest of the Appointeeship Clients and Appointeeship staff alike.
- Liaise with other teams within the council and external partners to ensure a holistic approach to care and support.
- Have effective working relationships with the Financial Assessment Team in relation to a clients Adult Services Charges in line with Adult Services Charging Policy.
- To ensure complete audits of client's expenditure by 3rd parties has taken place to ensure the financial interests of the client and the council are protected.
- Produce effective reporting in relation to Utility, insurance companies in relation to best value tariffs.
- Monitor purchases for clients via the company credit card, ensuring all documentation is included in Agresso and that clients are recharged.
- Ensure you operate within GDPR guidelines by regularly reviewing data held and destroying information in line with retention schedule.

In this job you will need

You must be able to demonstrate the following essential requirements:-

- Qualified to GCSE level with significant experience of working in an administrative role
- Significant knowledge of the DWP benefits system and associated thresholds.
- Good knowledge of the Adults Services Financial Assessment Process.
- Excellent skills in using multiple IT systems. To be an organised, logical and solution focussed person.
- Experience of working with clients in finance.
- To demonstrate knowledge of working within financial procedures.
- An ability to determine priorities and meet deadlines.
- Excellent interpersonal skills and demonstrate ability to engage, establish and maintain effective working relationships with stakeholders.
- Good customer service
- Have detailed understanding of relevant legislation, best practice guidance and key national policy.

- Understanding the statutory, regulatory, and key operational issues that are relevant to the service.
- Negotiation, mediation and facilitation skills and an ability to resolve conflict.
- Ensure you operate within GDPR guidelines by regularly reviewing data held and destroying information in line with retention schedules.

Our culture

For us, it's not just about all we achieve as an organisation, but how we do it. Therefore, all employees are expected to display our **Team Wigan** behaviours.

Be Positive... take pride in all that you do

Be Accountable... be responsible for making things better

Be Courageous... be open to doing things differently


Be Kind... be helpful, generous and thoughtful towards yourself and others


#TeamWiganDeal


Together we will


Deliver Deal 2030, working alongside our communities to make Wigan Borough an amazing and inclusive place to live and work, building a better future.

We will


 Genuinely care for you and your wellbeing.

 Champion a culture that inspires you to thrive.


 Listen and engage with you to bring your ideas to life.


 Celebrate your contribution and support you to reach your goals and aspirations.

I will

 Look after my wellbeing and be kind to myself and others.

 Work with others across #TeamWigan to be courageous, innovative and embrace technology.

 Share my ideas and be accountable for making things happen.

 Own my development and let my passion and positivity shine through.