**Job Description**

Job Title: Senior Client Funds Officer

Job number

Grade I / Scale 6

**Overall purpose of the job**

The purpose of the role is to provide a financial and safeguarding service to vulnerable adult service users that are subject to an appointeeship or deputyship to ensure financial affairs are managed appropriately and to offer protection from financial abuse. Ensuring duties are carried out in line with the requirements of the Mental Capacity Act 2005, Financial Regulations, Taxation, DWP legislation, The Office of the Public Guardian Standards and Court of Protection guidelines.

Resolve legal, financial, family and emotional matters that can often be challenging and complex in order to effectively manage clients personal financial affairs who have been assessed as having no capacity themselves to do so.

To ensure an integrated approach to Finance Operations through assisting with the implementation of new technologies, methodologies and processes that meet the needs of clients, customers and client organisations.

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|  | **Main accountabilities** |
| 1. | Responsible for day-to-day management of service users’ affairs and in line with current legislation and the stated policies of the organisations involved, making sound judgements / decisions. Work closely with the Team Leader and Corporate Deputy, keeping them informed of service user, process, system or performance issues and take responsibility for resolving issues or recommending options for resolving them as appropriate. |
| 2. | Manage and prioritise own case load which includes dealing with correspondence, making payments, providing emergency funds, claiming benefits to maximise a service users income, negotiating agreements, debt settlements, reporting information to the OPG / COP / DWP / Tax Office, representing and supporting service users at Tribunals and other legal / benefit related / tenancy related issues in order to meet the service users and organisations needs. Dealing with property maintenance, ensuring that client property is safe and secure, and house clearances as appropriate which will include inventory checks. Assisting with the administration of estates and funeral arrangements. |
| 3. | Ensure operational service priorities are met and customer and audit requirements are adhered to through effective workflow management. |
| 4. | Respond to and resolve complex and sensitive service requests and queries within the agreed service standard and according to operational procedures. |
| 5. | Provide advice to the Team Leader on areas of the service where improvements could be made and make recommendations to improve processes and efficiency. |
| 6. | Provide training, advice and support to other staff, departments and external bodies when dealing with service users affairs and operational procedures. |
| 7. | Attend meetings/ visits to complete annual finance reviews, best interest decisions, mediate and resolve issues face to face with internal/ external bodies and families. |

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| 8. | Embed customer service excellence within team through the design of customer focussed processes, active participation in one-to-one meetings / the PADP process and own behaviours. |
| 9. | Manage own workload and conflicting and critical priorities / deadlines, processing information / data accurately and in a timely manner. |
| 10. | Support system implementations including conducting system testing, developing system documentation / process notes and delivering training to staff on new system processes. Provide advice and guidance to other departments and external bodies when dealing with service users affairs. |
| 11. | Work collaboratively on projects that support both system and operational developments. Test systems, review work practises and support training. Provide improvements for the Finance Operations Service in a professional and positive way, improving performance on ongoing basis. |
| 12. | Demonstrate awareness / understanding of equal opportunities and other people’s behaviour, physical, social and welfare needs. Apply these principals with service users when giving consideration for best interest and decision making. |
| 13. | Ensure that reasonable care is taken at all times for the health, safety and welfare of yourself and other persons and to comply with the policies and procedures relating to health and safety within the business including Lone working policy. |
| 14. | Carry out any other duties which fall within the broad spirit, scope and purpose of this job description and which are commensurate with the grade of the post. |

**Safeguarding commitment** *(Include for roles involving work with children/vulnerable adults)*We are committed to safeguarding and promoting the welfare of children and young people/vulnerable adults. We require you to understand and demonstrate this commitment.

**Person Specification**

**Qualifications, knowledge, skills and experience**

Minimum level of qualifications required for this job

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| **Qualifications Required** | **Subject** | **Essential/**  **Desirable** |
| Educated to A level, NVQ Level 3 or experience gained in a similar or  related working environment | Business & Administration or Finance related experience | Essential |
| Full Driving Licence |  | Essential |
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Minimum levels of knowledge, skills and experience required for this job

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| **Identify Describe** | | **Essential/ Desirable** |
| **Knowledge** |  |  |
| Knowledge of Welfare Benefits processes and entitlements / Mental Capacity Act 2005 / the MCA code of practice / Court of Protection and Office of the Public Guardian procedures and regulations, financial regulations and personal taxation. | Substantial operational experience | Essential |
| Knowledge of ERP Systems | Some operational experience | Desirable |
| Knowledge of legal issues in handling complaints and queries | Some operational experience | Desirable |
| Knowledge of systems used to manage service user casework in a social care environment, e.g. CASPAR, Eclipse,  Sharepoint, Abacus, etc | Some operational experience | Desirable |
| **Skills** |  |  |
| Ability to collate, check, complete, produce, and present information relating to a service users activities, finances and capabilities using statistical data to enhance understanding and decision making Plus key terms/ terminology/requirements for benefit entitlements, claims and returns | Some operational experience | Essential |
| Ability to manage and prioritise your own workload. Maximising Income for the service user and minimising loss / debts. Dealing with issues, disputes and emergencies; making sound decisions as and when required. Planning the monitoring of service user budgets and future events. | Significant operational experience | Essential |
| Ability to understand and interpret national legislation, policies and guidance to ensure processes are | Some operational experience | Essential |

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| compliant with national requirements, working in the best interest of service users |  |  |
| Ability to gather financial and non-financial information related to appointeeship and deputyship service users to support applications for benefit, Tribunals, debt negotiations and the production of management information reports | Operational experience | Essential |
| Ability to travel to visit service users where appropriate | Some Operational experience | Essential |
| Excellent IT skills with good knowledge of Microsoft office applications | Significant operational experience | Essential |
| Ability to work with internal and external stakeholders, make joint decisions to support the delivery of the Client Funds service in line with the annual service plan | Significant operational experience | Essential |
| Ability to communicate with and influence people whilst demonstrating empathy, diplomacy and understanding of their care and disability needs and / or mental health needs | Significant operational experience | Essential |
| Ability to build and maintain good working relationships with a wider range of colleagues, internal and external service users and stakeholders to deliver the service | Substantial operational experience | Essential |
| **Experience** | Give an idea of the type and level of experience required **do not** specify years of experience. |  |
| Experience of developing user guides and training documentation for appointeeship and deputyship processes | Some operational experience | Desirable |
| Experience of working independently scheduling and prioritising own work to meet service requirements and service user requirements | Significant operational experience | Essential |
| Experience of visiting service users and representatives off site to support them with managing their financial affairs and ensuring that their property and assets are maintained. | Significant operational Experience | Essential |
| Proven customer service background with experience of conflict resolution, negotiation and diplomacy skills | Significant operational experience | Essential |
| Experience and proven ability to identify service improvements to current processes and manage change in a controlled way | Some operational experience | Essential |
| Supervisory experience | Some operational experience | Desirable |
| Experience of working with vulnerable service users, their carers and / or advocates | Substantial operational experience | Desirable |
| **Safeguarding** *(include for roles working with children/vulnerable adults)* | Demonstrate an understanding of the safe working practices that apply to this role. |  |
|  | Ability to work in a way that promotes the safety and well-being of children and young people/vulnerable adults. | Essential |

**Disclosure level**

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| What disclosure level is required for this post? | None | |  | Standard |
|  | Enhanced |  | Enhanced with barred list checks |
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**Work type**

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| What work type does this role fit into? (tick one box that reflects the main work type, the default workers type is flexible) | Fixed |  | Flexible |  | Field | Home |
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