

## Role profile

<b>Job Title:</b>	<b>Finance Officer – Client Financial Affairs Team</b>	<b>Grade:</b>	<b>9</b>
<b>Department:</b>	<b>Commissioning and Use of Resource</b>	<b>Post no.:</b>	<b>PO 29265</b>
<b>Directorate:</b>	<b>Adults and Public Health</b>	<b>Location:</b>	<b>Perceval House</b>
<b>Role reports to:</b>	<b>Senior Finance Officer – Client Financial Affairs</b>		
<b>Direct reports:</b>	<b>None</b>		
<b>Indirect reports:</b>	<b>Finance Support Officer – Client Financial Affairs</b>		

## Job description

**Recruitment practices to safeguard and promote the welfare of children and/or vulnerable adults apply to this post in addition to the requirement to obtain a Disclosure and Barring Service (DBS) check.**

### Purpose of role

- To be responsible for the statutory Protection of Property and Statutory Funeral Services and in assisting in the efficient and effective provision of a comprehensive client financial affairs function including the administration of Deputyship and Appointeeship services in accordance with statutory requirements and the Council's policies and procedures.

### Key accountabilities

- To be responsible for all aspects of the statutory funeral service, in arranging funerals for persons who die within the borough and where no other arrangements are being made. To act on behalf of and protecting and promoting the financial interests of deceased by deciding for the administration of their estates, ensuring all statutory obligations of the post are fulfilled including, compliance with section 26 of the Public Health Control of Diseases Act 1984, ensuring appropriate contact with relatives, and the implementation of known funeral wishes and estate administration.
- To be responsible for all aspects of the statutory Protection of Property service, acting on behalf of clients for the temporary protection of their property, assets and valuables in compliance with Section 47 of the Care Act 2014 and within the set procedures and guidance of the Client Financial Affairs Team.
- To be responsible for accessing client's property, completing searches and securing movable and immovable property, assisting in the removal and boarding of pets and carrying out regular property inspections.

- To be responsible for assisting in aspects of the Deputyship function, acting on behalf of customer in the general administration of their financial affairs, protecting and promoting their financial interests in line with the principles of the 2005 Mental Capacity Act.
- To be responsible for assisting in aspects of the Appointeeship function acting on behalf of customers in the general administration of their financial affairs, protecting and promoting their financial interests in line with DWP Regulation 33 of the Social Security (Claims and Payments) Regulations 1987.
- To be responsible for visiting clients under Deputyship and their representatives to ensure that their financial needs are being met. To complete a written report of all visits and to take any required action on behalf of the client as agreed.
- To be responsible for assisting in the efficient and timely completion of the annual Deputyship report to the Office of the Public Guardian and of other accounting processes, including the maintenance and reconciliation of accounts, payments of invoices and fees, ensuring adequate supporting documentation is maintained.
- To be responsible for assisting in the preparation, analysis, and provision of accurate financial and management information to be included in statutory returns and reports, in line with statutory requirements and the Council's policies and procedures.
- To be responsible for assisting in the preparation of Cabinet reports and responses to Members' enquiries in relation to all aspects of the client financial affairs function as directed by the Principal Finance Officer – Client Financial Affairs
- To be responsible for assisting in the review and update of all documentation, policies and procedures and compliance with statutory requirements in line with professional standards and the Council's policies and procedures.

## **Results Focus**

- To be responsible for assisting in the preparation and completion of complaint responses relating to the client financial affairs function including Freedom of Information requests, as directed by the Principal Finance Officer – Client Financial Affairs, in accordance with the Council and Departmental complaints procedure.
- To be responsible for assisting the Principal Finance Officer – Client Financial Affairs in effective liaison with external and internal audit, including the efficient filing and retention of documentation, maintaining appropriate audit trails for subsequent retrieval as and when required.
- To be responsible for assisting in the efficient preparation and production of timely and accurate routine and ad-hoc management information, in relation to all aspects of the client financial affairs function, required to support the planning and monitoring of service delivery and to meet internal and external reporting requirements, as directed by the Principal Finance Officer – Client Financial Affairs

## **Customer Focus**

- To be responsible for effective liaison with other teams such in Adults' Finance, Contracts, Social Work and Care Management, and to promote joint working arrangements and the sharing of information.
- To be responsible for reviewing the financial needs of adults at risk through regular meetings with them and their representatives. To compile a written report of the meeting and to make recommendations for meeting client's needs.

## **Job Expertise**

- To be responsible for ensuring the provision of appropriate, accurate and timely verbal and written advice and guidance to all levels of staff, in relation to all aspects of the client financial affairs function and in accordance with the Council's policies and procedures and legislative and legal guidelines and to promote awareness of good financial practice and control.
- To be responsible for meeting legal and statutory requirements of external agencies in the management of client's affairs such as the Office of the Public Guardian, Court of Protection, and The Government's Legal Department, the Department for Work and Pensions, The Coroner's Office, and the Registrar's Office.
- To be responsible for keeping up to date with current benefit legislation, The Mental Capacity Act and the supervision requirements of the Office of the Public Guardian and changes to these.
- To be able to effectively carry out duties and requirements of the role in accordance with internal procedures and protocols, and within the framework of legislative and legal requirements.

## **Communication**

- To build effective communication channels with main partners and external agencies such as The Government Legal Department, contracted Funeral Director, the Council's Animal Warden, Animal Boarding provider and banking provider.
- To be able to facilitate existing IT systems in place including Mosaic, Agresso, Microsoft Office, CASPAR, for gathering, recording, and maintaining relevant information.
- To be responsible for liaise effectively with commercial organisations such as utility companies, banks, building security and maintenance contractors for effective management of client's needs.

## **Change Orientation**

- To be responsible for assisting in the review and update of all documentation, policies and procedures and compliance with statutory requirements in line with professional standards and the Council's policies and procedures.

- To contribute to the ongoing review of corporate and departmental systems and procedures and implement decisions, as directed by The Senior Finance Officer – Client Financial Affairs

### **Managing Self**

- To be able to carry out required duties for the role with minimal supervision.
- To be responsible for keeping up to date with Accounting and Social Services legislation, regulations, standards, service developments and initiatives and the Council's policies and procedures.
- To be responsible for keeping up to date with service development by attending national organisation meeting e.g., Association of Public Authority Deputies (APAD) and contributing to benchmarking exercises and facilitating other amenities for maintaining own knowledge and best practice such as the APAD website and the Funeral Officer's Best Practice Group.

### **Working In Teams**

- To be responsible for providing support to Officers within the team and developing effective working relationships with colleagues to ensure that the Customer's receive an efficient and effective service.
- To be responsible for the promotion and implementation of all the Council's policies and procedures including equalities and diversity, health and safety, security and the use of personal data.

### **Key performance indicators**

- Reconciliation of client's accounts to be completed within 14 days of receipt of individual client bank statement.
- All manual invoices and bills to be paid within 21 days of receipt.
- Annual Deputy Report to be completed and submitted to the Office of the Public Guardian within 6 weeks of the anniversary of issue of clients' Court Order.
- Individual client Annual Self – Assessment statement to be completed and returned to HMRC by 31 October each year.

### **Key relationships (internal and external)**

- To be responsible for ensuring effective liaison with the Finance Operations, Income Teams and Care Management and Social Work Teams in relation to the provision of accurate customer information required for general case maintenance and to maintain and reconcile accounts and for making and receiving payments.
- To be responsible for ensuring effective liaison with statutory agencies such as the Office of Public Guardian, the Coroner's Office, solicitors, The Government Legal Department, customers and their representatives, CFA Banking providers Lloyds Bank

PLC particularly in relation to protecting and promoting the financial affairs of the customer.

- To be responsible for ensuring effective liaison with the Client, their relatives and close associates, Care Providers, commercial companies including banks and other financial institutions, utility companies, Housing providers and landlords.

### **Authority level**

- NA

## **Person specification**

Recruitment practices to safeguard and promote the welfare of children and/or vulnerable adults apply to this post in addition to the requirement to obtain a Disclosure and Barring Service (DBS) check.

### **Essential knowledge, skills and abilities**

1. Experience of providing services for the management and protection of finance and property (Essential)
2. To have a good working knowledge and understanding of the relevant areas of the Public Health legislation, the Care Act 2014 and the Mental Capacity Act 2005 and probate procedures in relation to the post duties. (Essential)
3. Experience of communicating and engaging with adults at risk with enduring mental health illnesses in person, in writing and on the telephone. (Essential)
4. To have knowledge and an understanding of central government welfare benefits and entitlement rules and to be able to apply this in relation to the duties of the post. (Essential)
5. To have knowledge and an understanding of financial administration including income processes and reconciliations (Essential)
6. Ability to communicate effectively both in person, in writing and on the telephone with staff, external agencies, customers and their representatives.
7. Ability to deal effectively with queries and to provide appropriate advice as required.
8. Ability to deal with high volume workloads, ensuring attention to detail and accuracy is maintained and the ability to prioritise work in response to unexpected urgent tasks.
9. Ability to use initiative and work effectively as part of a team, ensuring that targets and deadlines are achieved.
10. Ability to use corporate, Adults' Services and Income section's IT systems and generic software – in particular MS Word and Excel
11. An understanding of the Equalities and Diversity policy, in relation to staff and service provision

12. An understanding of Health and Safety requirements, in relation to self, staff, and service provision

### **Essential qualification(s) and experience**

1. To have or be studying towards an appropriate qualification e.g. GCSE Maths, English or NVQ II in Finance or Administration, or equivalent work based experience.

## Values and behaviours

Improved life for residents	Trustworthy	Collaborative	Innovative	Accountable
<ul style="list-style-type: none"> <li>• Is passionate about making Ealing a better place</li> <li>• Can see and appreciate things from a resident point of view</li> <li>• Understands what people want and need</li> <li>• Encourages change to tackle underlying causes or issues</li> </ul>	<ul style="list-style-type: none"> <li>• Does what they say they'll do on time</li> <li>• Is open and honest</li> <li>• Treats all people fairly</li> </ul>	<ul style="list-style-type: none"> <li>• Ambitious and confident in leading partnerships</li> <li>• Offers to share knowledge and ideas</li> <li>• Challenges constructively and respectfully listens to feedback</li> <li>• Overcomes barriers to develop our outcomes for residents</li> </ul>	<ul style="list-style-type: none"> <li>• Tries out ways to do things better, faster and for less cost</li> <li>• Brings in ideas from outside to improve performance</li> <li>• Takes calculated risks to improve outcomes</li> <li>• Learns from mistakes and failures</li> </ul>	<ul style="list-style-type: none"> <li>• Encourages all stakeholders to participate in decision making</li> <li>• Makes things happen</li> <li>• Acts on feedback to improve performance</li> <li>• Works to high standards</li> </ul>