ROLE DESCRIPTION

Role title	Client Finance Assistant		
Directorate	Corporate Finance		
Reporting to			
Grade	13		
Evaluation ref	AG1211	Job Family Ref	CCT13
Role purpose			
To collect information relating to service user's finances and their mental capacity, submit applications to the Court of Protection and to administer the finances of service users whose finances are managed by the Personal Finances Advisor. The purpose is to assure Senior Managers, service users and relatives that Departmental regulations and guidance are being adhered to but, also, that our procedures comply with current legislation and the requirements of agencies such as the Court of Protection, the Department for Work and Pensions, the banks and other financial institutions with whom service users have arrangements. See attached organisational chart.			

Key results area	**Accountability**
Corporate Responsibility	Understand, uphold, and promote the aims of the council's equality, diversity, and inclusion policies; health, safety and wellbeing of self and others; and Organisational values in everything you do. Equality and Diversity practice covers both interaction with staff, service users and communities and includes challenging discrimination and promoting equality of opportunity for all.
Facts and Figures	The Client Finances Team administer all Corporate Appointee ship cases of Somerset County Council and all Court of Protection property and affairs cases where Somerset County Council act as Deputy. The Team is also responsible for all applications submitted to the Court of Protection for property and affairs cases. Where the cases are administered by the Client Finances Team records of all income and expenditure on service users' bank accounts are maintained. A significant number of cases managed by the Client Finances Team involve the management of property and investments belonging to service users. The Client Finances Team are also responsible for the practice guidance on "Guidance for Health and Social Care staff on helping service users with their finances", providing information and advice to operational staff

	on all aspects of client finances and submitting applications to the Department for Work and Pensions for Somerset County Council to be set up as the Corporate Appointee to receive the benefits of service users who are unable to manage their own claims.
Problem Solving and Creativity	The practice guidance in this area has recently been updated and is well documented. It is less prescriptive than previously because the 2005 Mental Capacity Act which comes into effect fully on 1 October 2007 introduces new criteria in the decision making process for people who lack the capacity to make their own decisions. In particular, all decisions relating to service users' expenditure have to comply with the new Code of Practice which accompanies the Act. This sets out the test to be used when considering whether an individual has the capacity to make a decision, the requirement that all decisions must be made in the best interests of the individual lacking capacity, the need for all interventions to be the least restrictive option and allowing individuals to make unwise decisions. The post holder will need to balance the need to comply with our practice guidance with the requirement to comply with the Code of Practice. The post holder will need to take the Code of Practice into consideration when advising operational staff of the options for assisting service users with their finances. When dealing with service users' property and investments the post holder will need to be able to identify all issues to be resolved when we become responsible for managing their property and finances. The constantly changing demands of each case make it difficult to pre-programme work so the post holder will need to review cases regularly to ensure that work deadlines and constantly changing demands and priorities can be met.
Decision Making:	The post holder will plan their own workload within the general work plan set by the Personal Finances Adviser. The post holder will be expected to make decisions that take account of the service user's capacity to make that decision themselves (whether now or later), the best interests of the service user, their actions (prior to their incapacity) and the need for the solution to be the least restrictive means of achieving the desired outcome. In certain circumstances, where an individual is capable of making the decision they may choose to make an unwise decision and the receiver may have to act in accordance with their instructions.
Contacts and Relationships	The post holder is directed and supervised by the Personal Finances Adviser and will have daily contact with Senior Social Care Managers, Social Workers, Solicitors and Community Team Leaders providing information and advice on a range of issues relating to client finances.

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	The post holder will have regular face to face and telephone contact with service users and their families providing information and advice on a range of issues. The post holder will also be in regular contact with external agencies such as the Department of Constitutional Affairs, the Office of the Public Guardian, the Court of Protection, solicitors, banks, insurance companies, the Department of Work and Pensions seeking and providing information and advice on a range of issues.

Qualification/Knowledge/Experience/Skills

Work Experience

- Previous experience in a finance environment
- Proven ICT skills
- A thorough knowledge of the welfare benefits system, banking procedures, Court of Protection and Office of the Public Guardian procedures
- Ability to speak fluent English as stated in Part 7 of the Immigration Act (2016)

Qualifications

- Educated to at least GCSE standard (or equivalent) at Grade C/Level 4 or above including English Language and Maths

OR

- Appropriate administrative office work based experience that demonstrates the competencies in Section 1.

Skills

- Numerate, Literate, Flexible, Assertive and a good eye for detail and quality

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Dimensions of role

Working with Information & systems/processes

- Checks that information, data, reports, files and applications are accurate, fit-for-purpose and up-to-date.
- Ensures data is stored securely in a structured manner, following established formats and standards.
- Monitors procedures, practices, reporting inconsistencies and variances from defined standards and makes recommendations as appropriate.
- Contributes to the development of new and improved information systems, processes and procedures
- Collates, summarises and interprets statistical and financial information, identifying variances and anomalies - refers on or resolves as necessary.
- Follows and applies procedures appropriately in the resolution of a range of problems relating to systems and processes.

Communication

- Communicates clearly and accurately both orally and in writing to progress applications, enhance understanding, motivate others and facilitate decision making.
- Uses IT equipment to communicate with others, to maintain records and to assist with the production of financial and non-financial reports to support decision making.
- Communicates effectively with people at all levels using appropriate methods of interaction, tact and diplomacy whilst respecting confidentiality at all times.
- Able to communicate complex information / guidance / advice / requests / applications to service users, carers / family members, a wide variety of external organisations and to SCC staff at all levels.
- Communicates effectively face to face, on the telephone or in person with service users, carers or family members who on occasions may be angry, confused or aggressive.
- Responds to external and internal enquiries courteously and helpfully, seeking clarification where necessary and providing relevant information and advice primarily about procedures.
- Represents the team in the absence of the Manager.

Team Working

- Co-operative and open with colleagues, sharing information and checking understanding.
- Supports development of self and others through regular reflection and feedback on effectiveness of performance.

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- Adopts a flexible and adaptable approach to support other staff.
- Provides support/guidance to colleagues and responds positively others' contributions.
- Contributes to safe, healthy working practices and environment, and is prepared to challenge discrimination and harassment

Decision Making

- Makes decisions that take account of a service user's capacity to make that decision themselves (whether now or later), the best interests of the service user, their actions (prior to their incapacity) and the need for the solution to be the least restrictive means of achieving the desired outcome. In certain circumstances, where an individual is capable of making the decision they may choose to make an unwise decision and the receiver may have to act in accordance with their instructions.

Planning and Organising

- Plans their own workload within the general work plan set by the Personal Finances Adviser. Implements procedures to ensure routine tasks are carried out consistently and efficiently.
- Manages interruptions efficiently and in a calm manner, providing advice, direction or support as appropriate.
- Plans ahead to meet priorities and competing deadlines, targets, meetings and other tasks.
- Demonstrates an ability to use initiative and to organise and prioritise own workload and that of a clerical assistant.
- Monitors performance of self and others and implements corrective actions as necessary, to ensure agreed tasks are completed correctly and on time.
- Contributes to service planning and identification of team priorities and objectives on a daily basis.

Notes	
Working conditions:	37 hrs
Working arrangements:	Hybrid