

## Job Description

<b>Department:</b>	Adult Services
<b>Division/Section:</b>	Adult Social Care Financial Operations
<b>Job Title:</b>	Client Income Officer
<b>Post No:</b>	
<b>Grade:</b>	PCC Grade 7
<b>Reports to:</b>	Client Income Manager
<b>Organisation Chart:</b> Show immediate manager and any jobs reporting to this post.	<pre> graph TD     A[Head of Financial Operations - Adult Social Care] --&gt; B[Client Income Manager]     B --&gt; C[Client Income Officer] </pre>
<b>DBS Check applicable?</b>	<ul style="list-style-type: none"> <li>Basic <input type="checkbox"/> Standard <input type="checkbox"/> Enhanced <input checked="" type="checkbox"/> None <input type="checkbox"/></li> </ul>
	<b>Is post exempt under the Rehabilitation of Offenders Act 1974 in respect of declaration of spent convictions?</b> No
<b>Line Management responsibility for:</b>	<b>No. of direct reports:</b> 0 <b>No. of indirect reports:</b> 0
<b>Size of budget:</b>	N/A
<b>Job Purpose:</b>	To manage, account for and safeguard the financial affairs and resources of vulnerable adults for whom the Council acts as corporate appointee or corporate deputy.

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## Main Duties and Responsibilities:

1. Manage a caseload of deputy and appointee client cases to a high standard of accuracy and quality, prioritising duties as necessary to comply with relevant timescales and overseeing the control and administration of expenditure, debt repayment, welfare benefit entitlement, savings & investments and other assets of significant value - including property.
2. Effectively administer, maintain, and reconcile a range of financial transactions on behalf of clients to a high standard of accuracy and financial probity - acting at all times act in the best interests of clients ensuring that financial liabilities are properly due and can be met from available resources. Ensure that the operation of these functions complies with current relevant legislation and national / local appointee & deputy standards.
3. Gather information and prepare applications on behalf of vulnerable adults for the appointment of a Deputy by the Court of Protection or an Appointee by the Department of Work and Pensions.
4. Safeguard and manage personal financial resources and assets belonging to the client and arrange for appropriate disposal of these where necessary, and maximise income wherever possible by ensuring that all financial resources to which the client is entitled are secured/claimed.
5. Provide clear, accurate, relevant and timely information and advice about the Client Income Service, including the preparation of financial statements, HMRC returns, and witness statements to be used as evidence in court etc. as required - ensuring protection and confidentiality of client information.
6. Keep accurate records and account to the Court of Protection (COP), the Office of the Public Guardian (OPG) and the Department of Work and Pensions (DWP) as required.
7. Liaise and work closely with a range of agencies and organisations, social workers, family members and other representatives in the administration of the appointee and deputy functions – investigating financial and other matters and highlighting any concerns or incidences of fraud, financial mismanagement or abuse.
8. Meet directly with clients of the service at Council premises as required and undertake home visits as necessary with other individuals and agencies in the operation of the service - including in connection with the protection of clients' property.
9. Assist with the maintenance and development of operational procedures, processes and systems
10. Assist with direct payment monitoring activities as required.

<b>Generic Responsibilities:</b>	<p>To carry out all responsibilities with regard to the Council's Equalities Policy and Procedures and Customer Care Policy.</p> <p>To comply with all Health &amp; Safety at work requirements as laid down by the employer.</p> <p>The council is committed to safeguarding and promoting the welfare of children and vulnerable adults and expects all staff and volunteers to share this commitment.</p>
<b>Flexibility Clause:</b>	Other duties and responsibilities express and implied which arise from the nature

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	and character of the post within the department (or section) mentioned above or in a comparable post in any of the Organisation's other sections or departments.
<b>Variation Clause:</b>	<p>This is a description of the job as it is constituted at the date shown. It is the practice of this Authority to periodically examine job descriptions, update them and ensure that they relate to the job performed, or to incorporate any proposed changes. This procedure will be conducted by the appropriate manager in consultation with the postholder.</p> <p>In these circumstances it will be the aim to reach agreement on reasonable changes, but if agreement is not possible the Head of Service reserves the right to make changes to your job description following consultation.</p>

**DATE: Aug 2023**

**COMPLETED BY: MG**

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## Person Specification

<b>Job Title:</b>	Client Income Officer	<b>Post number:</b>	
<b>Grade:</b>	PCC Grade 7	<b>Department:</b>	People & Communities
		<b>Division:</b>	Adult Social Care Operations
<b>Hours:</b>	37	<b>Executive Director:</b>	Stephen Taylor
		<b>Service Director:</b>	Debbie McQuade
<b>Date:</b>	Aug 2023	<b>Completed by:</b>	Mark Gedney

ATTRIBUTES	ESSENTIAL CRITERIA	DESIRABLE CRITERIA
<b>KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>Knowledge of financial and accounting principles and practices</li> <li>General knowledge of Adult Social Care and safeguarding responsibilities</li> <li>Knowledge of current welfare benefits</li> <li>Knowledge of the role of a financial representative (appointee / deputy)</li> </ul>	<ul style="list-style-type: none"> <li>Knowledge of finance procedures and practices</li> <li>Knowledge of money advice and debt management</li> </ul>
<b>SKILLS &amp; ABILITIES</b>	<ul style="list-style-type: none"> <li>Excellent numeracy/accuracy and ICT skills</li> <li>Ability to collate, analyse and interpret financial information, follow procedures and exercise sound judgement</li> <li>Ability to plan and prioritise own workload to meet competing demands.</li> <li>Ability to work as part of a team</li> <li>Maintain and develop effective administration systems</li> <li>Ability to work quickly and with accuracy</li> <li>Ability to deal with sensitive situations with tact and diplomacy</li> <li>Effective verbal and written skills</li> <li>Effective problem solving and decision making</li> <li>Ability to establish effective working relationships with operational staff , managers and outside agencies</li> <li>Fluent English speaking skills</li> </ul>	
<b>EXPERIENCE</b>	<ul style="list-style-type: none"> <li>Experience of dealing with members of the public, including vulnerable people</li> <li>Experience of working with financial systems and maintaining procedures.</li> </ul>	<ul style="list-style-type: none"> <li>Experience of managing a large and varied caseload.</li> </ul>

<b>QUALIFICATIONS</b>	<ul style="list-style-type: none"> <li>• 5 GCSE's (or equivalent) at grade C or above including Maths and English (A &amp; I) or professional financial qualification (e.g. AAT)</li> <li>• Relevant experience/skills to evidence a similar level of attainment (A &amp; I)</li> </ul>	
<b>PERSONAL CIRCUMSTANCES</b>	<ul style="list-style-type: none"> <li>• Ability to work flexible hours when required</li> </ul>	
<b>EQUALITY</b>	Candidates must demonstrate understanding of, acceptance and commitment to the principals underlying equal opportunities. (A & I)	
<b>CUSTOMER CARE</b>	Knowledge and understanding of effective customer care (A & I)	

*[At the end of each criteria the following codes are used to indicate how the criteria will be assessed: (AI) Application / Interview, (P) Presentation, (W) Written Test.]*