



APPOINTEESHIP SERVICE

Job Description

Job Title: Customer Finance Officer

Salary: £22,888.80

Hours: Full time - 35 hours per week

Accountable to: Direct Payments Service Manager

Location: Knowsley Disability Concern, 263a Tarbock Road, Huyton, Merseyside, L36 0SD

Key deliverables: To provide an efficient and effective Appointeeship Service for valued and vulnerable adults in Knowsley that meets its statutory duties.

Key Result Areas: Valued and vulnerable adults in Knowsley receive support, tailored to their individual needs, to enable them to manage their financial affairs.

Principal Duties and Responsibilities: To ensure that all customers receive personalised support that meets their welfare benefits responsibilities and individual money-management needs, by:

- receiving and managing referrals for the service
- acting as the key contact between the person and their circles of care, liaising with adult health and social care teams, residential care homes, support staff, family members, local authority safeguarding teams, utility companies and the various Department of Work and Pensions (DWP) departments and Pension Service on their behalf
- processing applications to the DWP for appointeeship
- setting up and operating individual bank accounts for receiving and managing the claimant's monies
- collecting benefits and managing monies in the person's best interest
- making payments to meet the individual's financial responsibilities (and in line with their spending plan), including:

- rent/mortgage/care fees (including local authority charges)
- utility bills/broadband/TV licence
- household purchases
- repairs and maintenance
- payback of overpayments
- arranging payments and processes for individuals to access disposable income for their personal day to day spending, including issuing and providing prepayment debit cards for personal use
- setting up and managing direct debits and standing orders including topping-up prepayment cards
- completing benefit checks and dealing with the DWP and Pensions Service
- completing and signing DWP benefit claim forms, providing evidence of entitlement and reporting relevant changes in circumstances
- ensuring, where possible, that accumulated bank balances do not exceed the threshold at which means-tested benefits are reduced or stopped
- providing information on how monies are being spent
- updating and maintaining electronic records, including those in relation to next of kin
- dealing with funds and arrangements in the event of the person's death
- supporting health and social care reviews in relation to changes in the person's financial circumstances and/or their ongoing need for an Appointee
- Reporting any changes in the individual's circumstances to the relevant organisations
- dealing with queries from customers, the public, social workers and other external parties regarding Appointeeship
- contributing to the continuous development and improvement of the service:
 - conducting regular customer reviews
 - identifying and implementing any policy and procedural changes that may be required
 - reviewing, amending and updating information, guidance and publicity materials

Any other duties commensurate with the role of Customer Finance Officer considered necessary to further the aims of the service. This job description is not exhaustive and reflects the type and range of tasks, responsibilities and outcomes associated with the role of Customer Finance Officer.

General requirements of the post-holder:

- A commitment to Equal Opportunities and Anti-Discriminatory Practices
- Prepared to become familiar with and adhere to all of the organisations Policies and Procedures and to comply with KDC's Health and Safety requirements.
- A commitment to undertake the necessary training and development activities in order to fulfil the role and potential.
- Willingness to attend staff meetings, external events, conferences and other meetings as required.
- The offer of employment will be subject to an enhanced Disclosure and Barring Service record check (DBS) before the appointment is confirmed. Criminal convictions will only be taken into account when they are relevant to the post.

Key Working Relationships:

Customers, social workers, adult social care teams, local authority financial assessment team, families, care home staff, support workers, carers, and colleagues within the Direct Payments Support Service and KDC in general.

Other Information

KDC has recently launched a Corporate Appointeeship Service for individuals that need help managing their personal benefits. The service provides a flexible and accountable way for vulnerable people to meet their welfare benefit responsibilities and manage their income and expenditure.

This is a new post, created for this purpose, and will take responsibility for all service elements and operational activities in support of around 50 people coming on board over the next six months. Customers will be those living independently in the community as well as in residential care settings.

The post-holder will play a critical role in ensuring that systems and processes are established and embedded to enable successful achievement of the key deliverables and result areas set out above.

June 2021

Customer Finance Officer – Person Specification

Feature Sought	Essential	Desirable	Measure
Skills and Effectiveness	<ul style="list-style-type: none"> • High standard of numeracy and literacy • Excellent communication skills, including written, oral and listening skills. • Able to develop and maintain effective working relationships with colleagues and other agencies at all levels • Well-developed organisational skills • Intermediate or Advanced Level skills in Microsoft Excel • IT competent particularly in the use of Microsoft applications, databases and email • Excellent customer service skills • Able to work unsupervised on own initiative • Capable of balancing conflicting workload priorities 	<ul style="list-style-type: none"> • Ability to communicate and interact effectively, creatively and sensitively with people who have additional communication needs • Ability to develop and establish efficient workflows/internal procedures 	Application Form/ Interview
Knowledge	<ul style="list-style-type: none"> • Up to date knowledge of Department of Works and Pensions (DWP) and Pensions Service systems and processes for claims and appeals • Knowledge of DWP and the health and social care sector in relation to self-directed support and personalised budgets • An understanding of confidentiality and safeguarding vulnerable people. 	<ul style="list-style-type: none"> • Knowledge of law and legislation relating to Corporate Appointeeship/Deputyship • An understanding of the Care Act 2014 and the assessment process 	Application Form/ Interview
Experience/Achievements	<ul style="list-style-type: none"> • Supporting people with welfare benefits claims and appeals • Background in financial administration 	<ul style="list-style-type: none"> • Experience delivering appointeeship service 	Application Form/

Feature Sought	Essential	Desirable	Measure
	<ul style="list-style-type: none"> • Experience of using a range of financial systems and software packages • Experience in a customer service environment • Managing a client caseload 	<ul style="list-style-type: none"> • Experience in a health and/or local authority involving the delivery of welfare benefits/financial advice service • Experience operating and managing banking software systems, preferable PFS/EML Card Payment Systems 	Interview
Qualifications/ Professional Membership	<ul style="list-style-type: none"> • Good standard of basic education (GCSE Level and above) 	<ul style="list-style-type: none"> • NVQ Level 3 Finance • Health & Social Care qualification 	Sight of Qualifications
Other requirements of the job	<ul style="list-style-type: none"> • Friendly and approachable manner • Commitment to promote choice, independence, rights and inclusion • Ability to operate within GDPR guidelines by regularly reviewing data held and destroying information in line with retention policy 		Application Form/ Interview

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