# EAST SUSSEX COUNTY COUNCIL JOB DESCRIPTION

# JOB TITLE: Client Affairs Support Officer

# DEPARTMENT: Adult Social Care and Health

# LOCATION: St Mary’s House, Eastbourne

# GRADE: East Sussex Single Status Grade 6

# RESPONSIBLE TO: Adult Social Care: Financial Services Team Leader

# Purpose of the Role:

To schedule and complete case reviews regarding the financial affairs of clients for whom ESCC act as either Appointee or Deputy to comply with the requirements of the Office of the Public Guardian Deputy Standards and the Mental Capacity Act 2005.

To provide comprehensive administrative support to the Client Affairs Visiting Officer(s), clients and the Client Affairs Team as directed by management.

# Key tasks:

1. To review, to record and collate information held on IT systems for the Client Affairs team and to track progress of open cases. To ensure all recorded information is accurate, up to date and factual.
2. To review financial plans and budgets for clients, ensuring all financial entitlements/benefits/discounts and best deals are being received, and ensure the needs and wishes of clients’ are being considered in line with the requirements of the Mental Capacity Act 2005.
3. To identify areas where complex or more detailed follow up actions are required and pass onto the Appointee & Deputyship case workers.
4. To schedule, book and record all client visits for the Visiting Officer(s), to coincide with the start of client support and two – three months prior to their annual Office of the Public Guardian (OPG) report, or as otherwise directed.
5. To complete pre-visit reports for the Visiting Officer(s) providing appropriate information regarding the clients’ financial affairs and any other relevant factors.
6. To liaise with clients’ care providers and support network to gather information regarding clients’ wishes and needs.
7. To be aware of the diverse needs of client groups that the teamwork with; including mental health, alcohol and substance misuse, learning disabilities, autism, and older people with organic and functional mental health disorders.
8. To approve payments, ensuring appropriate validation and in accordance with defined processes and audit requirements.
9. To handle incoming telephone calls, e-mail correspondence and post to the team, referring queries to the most appropriate person.
10. To participate in the team duty rota as required and have an overview of the Protection of Property service, supporting the function as directed by the Team Manager.
11. To compile annual reports for the Office of Public Guardian for client’s transactions and current financial position.
12. To apply for and ensure correct receipt of all welfare benefits on behalf of the client. Ensure the correct financial assistance towards care is in place; referring to case workers those cases requiring review or more complex interventions.
13. To report any identified client Adult Protection issues to the appropriate person in accordance with Council policy and procedure.
14. To deal with the estates of deceased clients in a timely manner and make referrals to the Treasury Solicitor when necessary. Provide advice and guidance to family members as required.
15. To support with the sale of a client’s home, or other properties as directed by the Team Manager.
16. To ensure all work carried out under section 46 of the 1984 Public Health Act and the Care Act 2014 follows set guidelines and ensure standard of work remains consistent and in line with council policy
17. To ensure the confidentiality of information held electronically or on paper is in accordance with Council policy, the requirements of the Data Protection Act 1998 and Caldicot principles and other relevant legislation.
18. To record all Court of Protection Charges for Deputyship clients as directed by the Team Manager.
19. To take on specific work projects as directed by the Team Manager.

This job description sets out the duties of the post at the time when it was drawn up.  Such duties may vary from time to time without changing the general character of the duties or the level of responsibility entailed.  Such variations are a common occurrence and cannot of themselves justify a reconsideration of the grading of the post.

# EAST SUSSEX COUNTY COUNCIL PERSON SPECIFICATION

# JOB TITLE: Client Affairs Support Officer

# GRADE: Single Status 6

# Essential key skills and abilities

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| These criteria will be assessed at the application and interview stage |
| * High levels of numeracy and literacy. * Effective verbal and written communication skills * Ability to produce clear and concise correspondence * Ability to use own initiative in understanding tasks * Ability to understand, interpret and apply statutory legislation * Adaptable and flexible * Ability to prioritise conflicting demands and to work effectively under pressure to meet deadlines * Organisational skills * Ability to analyse financial information |

# Essential education and qualifications.

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| These criteria will be evidenced via certificates, or at interview |
| * 5 x GCSE level or equivalent including Maths and English at grade C and above. |

# Essential knowledge

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| These criteria will be assessed at the application and interview stage |
| Able to demonstrate knowledge in the following areas:   * Microsoft Office; particularly Outlook, Excel & Word and their application; * Database packages; |

# Desirable knowledge

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| These criteria will be assessed at the application and interview stage |
| * Knowledge of Deputyship standards and Court of Protection processes * Welfare Benefits |

# Essential experience

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| These criteria will be assessed at the application and interview stage |
| * Experience of working in a job where accurate figure work and good customer service skills are required. * Dealing with customers with a variety of abilities. * Effective communication, both written and oral. * Working on own initiative. |

# Desirable experience

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| These criteria will be assessed at the application and interview stage |
| * Working knowledge of Data Protection. * Using computerised financial systems |

# Other essential criteria

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| These criteria will be assessed at the application and interview stage |
| * Ability to manage constant and conflicting demands and meet tight deadlines. * Diplomatic, innovative and self-motivated. * Ability to work constructively with colleagues, both internal and external and as part of a team. * Ability to work flexibly * Personal resilience and able to manage own stress. |

**Date (drawn up): Modified June 2019**

**Name of Officer(s) drawing up person specifications:**

**Job Evaluation Reference: JE9477**

Health & Safety Functions

This section is to make you aware of any health & safety related functions you may be expected to either perform or to which may be exposed in relation to the post you are applying for. This information will help you if successful in your application identify any health-related condition which may impact on your ability to perform the job role, enabling us to support you in your employment by way of reasonable adjustments or workplace support.

| **Function** | **Applicable to role** |
| --- | --- |
| Using display screen equipment | Yes/No |
| Working with children/vulnerable adults | Yes/No |
| Moving & handling operations | Yes/No |
| Occupational Driving | Yes/No |
| Lone Working | Yes/No |
| Working at height | Yes/No |
| Shift / night work | Yes/No |
| Working with hazardous substances | Yes/No |
| Using power tools | Yes/No |
| Exposure to noise and /or vibration | Yes/No |
| Food handling | Yes/No |
| Exposure to blood /body fluids | Yes/No |