

<b>Role Title</b>	<b>Direct Payments &amp; Financial Customer Support Officer</b>
<b>Job Family</b>	<b>Adult Services</b>
<b>Competency Level</b>	<b>Officer</b>
<b>Pay Range / Scale</b>	<b>Scale 6</b>
<b>Purpose</b>	
<p>To support activity delivered through the Direct Payments Team and provide professional, proactive, customer focused support both internally and externally. This will include developing and delivering specialist support / advice for direct payments to clients and ensuring, relevant legislation, regulations and policies are complied with and Direct Payment clients, are enabled to use their payments in a way that promotes choice, control, flexibility and independence. This role will support the team with administration and undertaking regular auditing of client accounts to ensure effective and appropriate use of Council funds by clients receiving Direct Payments and support with undertaking recovery of client funds as and when appropriate.</p>	
<b>Generic Accountabilities</b>	<b>End Results/ Outcomes</b>
Provide advice and make recommendations based on up to date knowledge and analysis / evaluation of information.	<p>Advice, information, interpretation and support are provided on the full range of technical / professional issues within the area of responsibility.</p> <p>Issues are managed through to a satisfactory conclusion.</p> <p>Risk to the Council is minimised.</p>
Contribute to the development of service plans to meet strategic business goals.	<p>Strategic and operational input is provided to wider business planning and development.</p> <p>Customer needs are identified.</p> <p>Services meet legislative and policy requirements.</p>
Research developments in relevant area. Collate process and analyse information / data. Translate outputs into advisory reports / documents / actions as appropriate.	<p>Relevant information / data are managed efficiently and accurately.</p> <p>Accurate and relevant information / reports / documentation are produced.</p> <p>Trends and issues are identified and prioritised.</p> <p>Statutory and procedural obligations are fulfilled.</p> <p>Management decision making is supported.</p>
Support with development, implementation, maintenance and management of systems, policies, procedures and / or	<p>Changes to systems, policies and / or procedures are identified and recommended.</p> <p>All updates, amendments, developments are tested and</p>

standards within area of responsibility.	<p>approved prior to delivery.</p> <p>Customers receive prompt, accurate policy / procedural updates.</p> <p>Service standards are improved.</p>
Work closely with others to support/Manage the development and delivery of improvements in processes and procedures.	<p>Identifies gaps in service provision/highlight policy issues and makes recommendations to resolve the issues.</p> <p>Agreed improvements are developed, delivered and evaluated.</p> <p>Issues and recommendations are brought to the attention of senior managers.</p> <p>Benchmark against best practice authorities and center of excellence.</p>
Support with the presentation of a full range of reports (both standard and non-standard) covering area of responsibility.	<p>Reports are prepared, distributed / presented to the appropriate committee/ to the required standards and timescales.</p> <p>Evidence based recommendations are made.</p>
Support the team with a portfolio of Projects and Reviews.	<p>Projects are delivered to agreed specification, timescales and budgets.</p> <p>Change initiatives are successfully integrated and implemented across all impacted service areas.</p> <p>Value for money is achieved.</p> <p>Ongoing savings secured.</p>
Co-operate with and support colleagues.	<p>Colleagues are supported.</p> <p>Required information is provided.</p>
Act in accordance with all policies and procedures which apply to the job and understand the reasons for this.	<p>All policies and procedures are complied with.</p>
Carry out all duties and responsibilities with reasonable care for the health and safety of self and others and report any potential hazards or unsafe practices to line manager.	<p>Work is carried out in a way that is safe and without risks to health.</p>
Support with administration activity and management of work within the team	<p>Activity delivered through the team is of high quality and delivered in a timely fashion to deliver good outcomes.</p>

<b>Job Specific Accountabilities:</b>	
<p>To provide appropriate support, advice and information about Direct Payments in a way that promotes choice, control, flexibility and independence.</p> <p>Support the Direct Payments manager to provide an effective service.</p>	<p>Proactive support is provided to the team as directed.</p> <p>Work is carried out in a way to promote the aims and objectives of the Direct Payments Team and implementation of the relevant policies and standards.</p> <p>All quality assurance and performance measures are adhered to.</p> <p>Clients are provided with advice and information and are clear on monitoring arrangements, employers responsibilities and best use of Direct Payments.</p>
<p>To keep up to date with Direct Payments legislation, guidance and best practice</p>	<p>Policies and procedures are complied with and work is carried out appropriately and in accordance with the relevant statutory guidance and national legislative frameworks</p>
<p>To work collaboratively with the Adult Social Care teams and other internal and external agencies relevant to the work of the Direct Payments Team</p>	<p>Liaising with appropriate internal and external agencies and colleagues to support a coordinated approach to the use of Direct Payments in Waltham Forest.</p> <p>Support with ensuring that adequate information is obtained about clients to enable a financial assessment to be undertaken.</p> <p>Liaising with clients, adult care management and other stakeholders to resolve issues and provide information and advice.</p> <p>Provide advice and support to adult care management colleagues when more advice and support is required.</p>
<p>To support with the adequate and robust monitoring of Direct Payments expenditure</p>	<p>Direct Payments are used appropriately in accordance with national and local guidance</p> <p>Reconciliation and regular auditing of client accounts to ensure effective use of resources, managing financial claw-backs of un-used funds where applicable</p> <p>Maintain all necessary records and documentation on the appropriate recording system in accordance with relevant policies and procedures</p>
<p>Support the Financial Compliance &amp; Direct Payments manager and the Direct Payments manager to provide an effective service</p>	<p>Work is carried out in a way to promote the aims and objectives of the Financial Compliance &amp; Direct Payments Teams and implementation of the relevant policies and standards</p>

	<p>Develop and support the implementation of relevant strategic and service-level plans.</p> <p>Working collaboratively to ensure the direct payments team achieves its objectives and contributes towards meeting the aspirations of ASC in Waltham Forest</p> <p>All quality assurance and performance measures are adhered to.</p> <p>Resources can be deployed effectively across the service area as required to meet business requirements.</p>
<p>Identify actual or potential risk and safeguarding situations, escalating concerns where appropriate</p>	<p>Making recommendations for actions as necessary</p>
<p>Support with the delivery of Key Performance Indicators (KPI's) and quality assurance measures for all aspects of Direct Payments.</p>	<p>Deliver against targets for the relevant Key Performance Indicators (KPI's) for measuring impact and efficacy of cost avoidance and clawback initiatives.</p> <p>Facilitate Direct Payment audits and provide reports to the Financial Compliance &amp; Direct Payments Manager, senior management and relevant governance structures</p>

<p><b>Nature of Contacts</b></p> <p>Typically involves Heads of Service, and Senior Managers across the authority, and external agencies and organisations providing advice regarding direct payments.</p> <p>May involve direct contact with members of the public.</p> <p>Develop sensitivity, persuasiveness, and negotiation and assertiveness skills to communicate with diverse audiences in emotive circumstances. Deal with people at all levels confidently, sensitively and diplomatically.</p>
<p><b>Procedural Context</b></p> <p>Act within guidelines and standard procedures with discretion to allocate or otherwise organise work to meet service delivery requirements. Works within laid down procedures but needs to deal with day-today problems without always referring to others. Decisions will be made based on Council procedures. Occasionally the post will be expected to work from other locations</p>

## Resourcing

Budget Responsibilities: **No**

Supervisory Responsibilities: **No**

## Knowledge, Skills and Experience

### Essential

- Good knowledge and application of IT systems and software packages, specifically Microsoft
- Knowledge of legislation relevant to social care, in particular the Care Act 2014.
- Experience of providing innovative and effective solutions in complex situations.
- Excellent oral and written presentation skills.
- Ability to work flexibly, balancing competing priorities and meeting deadlines whilst understanding the needs, timescales and deadlines of others.
- Experience in customer-focused environments with a proven ability to work independently, solve problems, and take initiative to provide excellent service.
- Maintains a high level of professionalism, care, and integrity, always promoting a positive image of the organization.
- Possesses clear communication skills and the ability to build strong relationships. Can deal diplomatically and confidentially with a wide range of internal and external customers.
- Highly flexible with a positive attitude, adapting easily to change and new service requirements.
- Proactive in identifying difficulties and problems, recommending corrective action, and resolving issues effectively.
- High level of professionalism, care and integrity, ensuring a positive image of the organisation is promoted at all times.
- Strong time management skills to ensure strict adherence to pay run and billing cycles.
- High level of flexibility, a positive attitude and ability to adapt to changes.
- Highly organised with the ability to multi-task and be flexible to respond to service delivery requirements across the service
- Willingness to learn new skills, processes and systems as appropriate to the role

### Desirable

Previous experience of administering Direct Payments or working within a financial administrative context

### Indicative Qualifications

Degree or equivalent or vocational qualification in relevant subject or area

Evidence of Continuous Professional Development

The above profile is intended to describe the general nature and level of work performed by employees in this role. It is not intended to be a detailed list of all duties and responsibilities which may be required. This role profile will be supplemented and further defined by annual objectives, which will be developed in conjunction with the post holder. It will be subject to regular review and the Council reserves the right to amend or add to the accountabilities listed.