



# JOB DESCRIPTION (JD) AND EMPLOYEE SPECIFICATION (ES)

Standard Template

<b>JOB TITLE:</b>	Apprentice Finance Assistant – Level 2		
<b>GRADE:</b>	Apprentice	<b>SERVICE AREA:</b>	Finance
<b>JOB CODE:</b>			
<b>REPORTS TO:</b>	Finance Officer – Client Welfare Services	<b>LOCATION:</b>	Civic Centre
<b>SPECIAL CONDITIONS:</b>	<ul style="list-style-type: none"> <li>As a front facing role, this post is covered by the Government's Code of Practice on the English Language Fluency Duty for public sector workers. You will be expected to communicate verbally with customers and provide advice and/or information in accurate spoken English.</li> <li>BPSS check required for this post</li> </ul>		

## 1. Main purpose of the job role:

- To provide support in delivering an efficient and effective client welfare service.
- To provide day to day delivery of financial administration support functions for appointee and deputy clients.

## 2. Role specific duties and accountabilities:

- Act in the best interests of appointee and deputy clients at all times.
- Provide support and assistance in dealing promptly with all financial and administrative matters relating to appointee and deputy clients. This will include liaising with service users, offering advice and guidance, payment of invoices and other liabilities and ensuring timely payment of personal monies.
- Provide support in maximising benefits by identifying unclaimed benefits and completing DWP application forms. This may involve joint visits to clients in their home or attending the job centre appointments.
- Responsible for accurate and effective recording and maintenance of financial transactions, including investigation of unreconciled amounts, within the relevant social care client systems and corporate financial systems in order to ensure integrity of data.
- Work with senior officers, colleagues and other stakeholders to deliver integrated and effective business processes which ensure that corporate, service and team objectives and targets are met.
- Provide a cost effective customer focussed service by working with customers and colleagues to ensure their needs are met.
- Provide support and work with colleagues in matters relating to compliance of processes, procedures, new legislation and guidance, including providing support for internal and external audits.

- Effectively manage own workloads and resources as allocated.
- Attend and actively participate in meetings as appropriate.
- Provide training and support as appropriate.
- Support the final accounts process as appropriate.

### **3. Corporate duties and accountabilities:**

- The post holder will comply with and promote the Council's Health, Wellbeing and Safety at Work policies and ensure these are implemented effectively within his/her areas of responsibility.
- Through personal commitment and clear action, the post holder will promote the Council's employment policies, with particular reference to diversity, equality of access and treatment in employment, service delivery and community involvement. To support/develop a working culture within these services that reflects the corporate vision.
- Ensure that the services provided aligned to the Council strategy, vision, aims, objectives, priorities and continuous improvement programme and play their part in achieving these. This includes compliance with Standing Orders, Financial Regulations, Code of Conduct and the Councils Policies and Procedures.
- This job description sets out a summary of the duties and accountabilities of the role. It is not intended to be exhaustive.



JOB TITLE Apprentice Finance Assistant – Level 2	GRADE Apprentice	
Using the Job Description consider what essential behaviours, abilities and knowledge are required by a person to perform each of the main activities and accountabilities of the job safely and effectively.	Indicate when Assessment is possible: at Application form=A interview=I both=A/I test = T	<b>WEIGHT CODE</b> shows relative importance Low=1 Medium=2 High=3
<b>Behaviours:</b> <i>refer to corporate behaviours document</i>		
<b>Professionalism</b> - Actively seek ways to prevent over-complication or confusion of service delivery through innovation, being open to change and the removal of barriers including challenging negative behaviours.	I	3
<b>Leadership</b> - Leads by example, optimising those resources allocated, Communicates clearly taking account and welcoming feedback. Takes a positive and resilient approach to change understanding the longer-term vision of the Council and/or service areas.	Not Applicable	
<b>Accountability</b> - Adopt a 'can do' attitude in the work that I deliver taking accountability for my own performance and development and responsibility for my actions and decisions. I will demonstrate inclusivity and promote the values of diversity and equality.	I	3
<b>Transparency</b> - Work with others to reach a common goal; sharing information, supporting colleagues and searching out expertise and solutions from relevant partners and/or communities we serve.	I	3
<b>Ethical</b> - Aware of own impact on others through valuing openness, treating everyone with respect and listening carefully to understand the views of others in order to build trust.	I	3
<b>Abilities/Skills:</b> (refer to JE guidance document)		
1 Ability to interpret basic financial information and understanding of matters relating to non-compliance of processes and procedures.	A/I	3
2 Ability to communicate verbally with customers and provide advice and information on processes, policies and legislation in accurate spoken English.	I	3
3 Ability to work flexibly.	A/I	3
4 Ability to manage own workloads and resources	A/I	3
<b>Knowledge/Experience:</b> specify type, level and qualitative (not quantitative required); if any.		
5 Experience of working in a financial administration environment	A/I	3
6 Knowledge of financial matters related to deputy and appointee clients personal affairs and basic knowledge of Court of Protection regulations	A/I	2
7 Experience of providing a customer focussed service.	A/I	3
8 Basic knowledge of DWP benefits	A/I	1
9 Experience in the use of IT applications such as Microsoft Office.	A/I	2
10 Knowledge and understanding of objectives and targets.	A/I	1
11 Experience in the use financial systems for processing and validating financial transactions plus monitoring of data and producing reports.	A/I	2
12 Experience in the effective delivery of training	A/I	1

13 Experience of providing support on audit matters			A/I	1
<b>Qualification:</b> Specify any qualifications that are a minimum requirement, please include any equivalent qualifications that would be deemed acceptable or if this can be obtained through on the job experience.				
GCSE grade C and above (or equivalent) in Maths and English			A	
Willing to undertake appropriate training as necessary, (including possible attendance at a study centre) in the pursuit of achieving a recognised Apprenticeship – Finance Assistant level 2			A/I	3
<b>Other Essential Requirements</b>				
14 An awareness of, and commitment to, equality of opportunity			I	2
15 Awareness of, and commitment to, confidentiality and handling data			I	2
<b>Prepared by:</b>	Debbie Roberts	<b>Date:</b>	08/06/21	