



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

Standard Template

<b>JOB TITLE:</b>	Finance Administrator – Client Welfare Services		
<b>GRADE:</b>	G5	<b>SERVICE AREA:</b>	Finance Assessments and Charging Team
<b>JOB CODE:</b>	RT422SENIG5		
<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>Your designated place of work will be the Civic Centre. The council operates customer focused hybrid ways of working. This is subject to change and you may be required to work from other locations, short or long term.</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.
- Responsible for managing the financial affairs of Deputyship clients. This will include providing support in completing annual reports, attending annual reviews, and ensuring capital assets are invested and/or liquidated appropriately in accordance with the Court Order.
- Responsible for completing DWP applications for receipt of benefits and maximising income. This may involve joint visits to clients in their home or attending the job centre appointments, providing debt and benefits advice, carrying out benefit checks, helping prioritise debts, working out budgets and gaining agreement to repayment plans.

**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 on bank transactions including validating and releasing payments.
- 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 senior managers in the implementation of corporate initiatives.
- 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 Senior Finance Administrator – Client Welfare Services	GRADE: G5	
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> refer to corporate behaviours document		
<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.	A/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.	A/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.	A/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.	A/I	3
<b>Abilities/Skills:</b> (refer to JE guidance document)		
Ability to interpret basic financial information and understanding of matters relating to non-compliance of processes and procedures.	A/I	3
Ability to communicate verbally with customers and provide advice and information on processes, policies and legislation in accurate spoken English is essential for the post.	A/I	3
Ability to work flexibly.	A/I	3
Ability to manage own workloads and resources	A/I	3
<b>Knowledge/Experience:</b> specify type, level and qualitative (not quantitative required); if any.		
Experience of managing appointee and deputy personal finances including the use of financial systems for processing and validating transactions plus monitoring of data and producing reports.	A/I	3
Knowledge of financial matters related to deputy and appointee clients' affairs and knowledge of the role of a Corporate Appointee and Deputy.	A/I	2
Experience of providing a customer focussed service.	A/I	3
Experience and understanding of DWP benefits, including applications and maximising income.	A/I	3
Experience in the use of IT applications such as Microsoft Office.	A/I	2
Knowledge and understanding of objectives and targets.	A/I	2
Experience in the effective delivery of training	A/I	1

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.		
Possession of or willing to study GCSE business or office qualification at pass or higher or equivalent experience gained at appropriate level.	A/I	3
<b>Other Essential Requirements</b>		
An awareness of, and commitment to, equality of opportunity	I	2
Awareness of, and commitment to, confidentiality and handling data	I	2
<b>Prepared by:</b> David Plant	<b>Date:</b> 01/08/23	