**SEFTON COUNCIL**

**JOB DESCRIPTION AND PERSON SPECIFICATION**

**Department:** Adult Social Care

**Division:** Client Support

**Post:** Client Support Officer

**Grade:**  **F**

**Location:** Any location within the borough

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**Responsible to:**

Senior Self-Directed Support Officer and Self-Directed Support Officer

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**Job Purpose:**

* The role will include the administration of direct payments, support and liaising with direct payment account holders, practitioners and providers as necessary.
* To process and reconcile direct payment accounts in Sefton Social Care.
* Paying invoices to care providers on behalf of account holders.

**RESPONSIBILITIES**

1. Ensure that relevant financial information has been submitted by clients in required timescales, and systems checked to ensure accuracy of information.
2. Reconcile client expenditure/income against Direct Payment provision in accordance with the Direct Payment Agreement, employer’s legislation and guidance, and record findings within the templates in the Liquid Logic system.
3. Investigate any discrepancies including variances and misappropriation in the direct payment accounts and highlight to senior officers; monitor outstanding actions and take appropriate action.
4. Once account reconciliation is completed generate a Liquid Logic audit report and letter and once authorised send to direct payment account holders detailing the outcome of the reconciliation, action points and deadline for completion.
5. Liaise with direct payment account holders and appropriate professionals regarding the direct payment account in a sensitive and respectful manner.
6. Respond to requests, enquiries or complaints regarding direct payment accounts, invoices, pre-paid cards, both verbal and/or in writing, from a wide range of contacts, including clients, account holders, Social Care staff or providers.
7. Verify Virtual Account invoices against client Social Care records and make payments via the Prepaid card system.
8. Upon request from the direct payment account holder pay invoices, personal assistant wages, HMRC and other authorised expenditure through the Prepaid card system and ensuring compliance with security profiles within this system.
9. Ensure that all client records are maintained and are accurate and up to date.
10. Redirect complex account queries or concerns about harm/abuse or financial abuse to clients to senior officers for advice, guidance and instruction.
11. Develop and maintain an up-to-date knowledge of policies and procedures relating to social care and financial processes.
12. Provide general administrative support and any other financial reconciliation exercises as directed.

**GENERAL:**

 This job description is a representative document. Other reasonably similar duties may be allocated from time to time commensurate with the general character of the post and its grading.

All staff have a duty to take care of their own health & safety and that of others who may be affected by your actions at work. Staff must co-operate with employers and co-workers to help everyone meet their legal requirements.

The Authority has an approved equality policy in employment and copies are freely available to all employees. The post holder will be expected to comply, observe and promote the equality policies of the Council.

Since confidential information is involved with the duties of this post, the postholder will be required to exercise discretion at all times and to observe relevant codes of practice and legislation in relation to data protection and personal information.

Undertake, and participate in training, coaching and development activities, as appropriate.

The person appointed will be expected to work flexibly and the exact nature of the duties described above is subject to periodic review and is liable to change.

**Prepared by: Name:** Karen Lee

 **Designation:** Team Manager – Client Support

 **Date:** April 2023

**SEFTON COUNCIL**

**PERSON SPECIFICATION**

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| --- | --- | --- | --- |
| Post: | **Client Support Officer.** | Post No. |  |
| Department: | **Adult Social Care** | Division: | **Client Support** |
| **Personal Attributes Required** | **Essential (E)****or****Desirable (D)** | **Method of Assessment** |
| **Relevant Education / Training**GCSE Maths or equivalent/NVQ3/experience or skills | D | AF/C/I |
| **Experience** Demonstrable experience of:1. Supporting the delivery of customer focused financial services.2. Maintaining records within I.T. Systems and computerised financial systems.  | EE | AF/IAF/I |
| **Ability/Skills/Knowledge**1. Effective communication and interpersonal skills including the ability to demonstrate diplomacy and sensitivity. 2. Proficient and demonstrable skills in literacy and numeracy3. Ability to operate effectively with a high volume and at times, highly sensitive workload. 4. Ability to prioritise own workload and to meet predetermined deadlines.5. Ability to work effectively in a team.6. Ability to work from own initiative.7. Understanding of social care  | EEEEEED | AF/IAF/IAF/IAF/IAF/IAF/IAF/I |
| **Personal Style and Behaviour**1. Personal commitment to ensure services are equally accessible and appropriate to the diverse needs of service users. 2. Motivated and enthusiastic. 3. A commitment to continually develop and update knowledge 4. Respects confidentiality. | EEEE | AFAFAFAF/I |
| Prepared by: Team Manager – Client Support | AF | = Application Form |
|  | I | = Interview |
| Date: July 2022 | CP | = Certificates= Presentation |