

Job Title: Money Management Team Administrator	Role Profile Number: SBC_11867
Grade: L	Date Prepared: 21/04/2023
Directorate/Group: Finance	Reporting to: ASC Money Management & Finance Services Manager

Job Purpose

- To assist Case Officers to administer vulnerable adults' finances who are in residential care and the community where there is no other appropriate person to act on their behalf under an Appointee or Deputyship service.
- Ensure that legal and financial requirements are met whilst ensuring the five principles of the mental capacity act are complied with and Office of the Public Guardian standards are met.
- Meeting the needs of our customers and ensure high levels of customer satisfaction are achieved.
- Ensure all activities are performed in accordance with defined processes, timetables and in a compliant manner.

Key Accountabilities

- To record management information on a excel spreadsheet-based system designed in house for the processed transactions in order to assist in service improvements and provide an audit trail to demonstrate compliance, good record keeping and fair customer outcomes.
- Committed to meeting deadlines and adhering to requirements in relation to accuracy and high-pressure timescales.
- To deal with enquiries from both external and internal customers.
- Ensure that payments are made timely and accurately where requested to by the Case Officers.
- Monitor and maintain the team inbox on a daily basis, ensuring that all emails are allocated or processed within 48 hours of receipt (excluding weekends).
- Reconciliation of monthly bank account statements for all Appointee and Deputyship cases held by the Money Management Team.

- Liaise with banks, solicitors, public bodies, estate agents, utility providers and any other organisations where capital may be held and or debts may exist. Including the closure of the client's extraneous accounts ensuring effective management of the client's property and financial affairs, whilst undertaking meetings with internal social workers and external service users, over the phone and face to face where applicable.
- Develop and maintain an effective relationship with the nominated SBC Deputyship Officer and Complex Case Officers and ensure appropriate matters are brought to their attention and resolved in a timely manner.
- To assist the Team Manager in improving standards and procedures of the team. Contribute to continuous improvements in processes, procedures, and controls in order to deliver efficiencies and service enhancements whilst making savings for the council.
- Provide cover at busy times as required. Liaise closely with other colleagues, building and maintaining good relationships; work on joint/cross-service activities to optimise team utilisation; and contribute to team objectives.
- Promote a customer focused and team-based culture that identifies, communicates, and addresses customer needs.
- Undertake any other duties as required by the Council or Team Manager within the scope of the role.

Supplementary Accountabilities

- To uphold and comply with the statutory provisions of Health and Safety at work Act 1974 and the management of Health and Safety at Work regulations 1999.
- To understand and promote equality and diversity best practice in all areas of work
- To maintain confidentiality and comply with Data Protection Act.
- Ensure that any identified personal training needs are discussed with the Team Manager including being appraised in accordance with the Council's development and appraisal scheme.
- Familiar with Best Interest framework.

Knowledge & Experience

Candidates must have substantial knowledge and experience in the following areas of business and will be required to provide evidence of this:

- Demonstrable administrative experience to include the use of a variety of systems and to input high volume transaction data.
- Ability to communicate effectively with colleagues, customers and contacts across all platforms.
- Good interpersonal skills.
- Strong organisational skills, customer and delivery focus.
- Mathematically minded with good numeracy and analytical skills with the ability to work with financial information.
- Experience in a similar team or post within a service organisation.

- Competent and experienced in the use of MS Excel, Word and Outlook.

Qualifications

- Educated to GCSE level (grade A-C) or equivalent in Maths and English.

Decision Making

- Prioritisation of work
- Self-motivated and pro-active.
- Good decision making and judgement, more complex matters to be escalated to the Case Officers or Team Manager.
- Assessing benefit entitlement and applying accordingly dependant on individual circumstances
- Reconciliation and monitoring decisions are made within broad criteria governed by good accounting practice and within DWP and Court of Protection/Office Public Guardianship guidelines
- Discretion to deal with errors and ad hoc financial queries according to need of clients.
- More complex issues that arise are to be brought to the attention of the Case Officer or Team Manager
- Scrutinizing payments ensuring affordability within our authorisation limits.

Creativity and Innovation

- Ability to identify opportunities to improve standards and procedures within the team.
- Flexibility to meet the varying demands of the role.
- Proactively identifying opportunities to manage workload more effectively.

<p><u>Job Scope</u></p> <p>Number and types of jobs managed</p> <ul style="list-style-type: none"> • Invoice payment and queries • Closure/Wind Down of deceased cases • Benefits administration and monitoring • Money Management • Banking • Bank reconciliations • Ledger controls and checks • Court of Protection Applications • Procedure Guidelines • Process Improvements <p>Typical tasks supervised/allocated to others</p> <ul style="list-style-type: none"> • None 	<p>Budget Holder Responsibility</p> <p>Asset Responsibility:</p>	<p>No</p> <p>Laptop and Mobile</p>
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Contacts and Relationships

(how the role relates to the work of others i.e. officers, groups, committees, general public, members, partner organisations, internal and external contacts of the council)

- Regular contact via telephone, email and answering enquiries from Internal SBC managers/ staff.
- External: Department of Works and Pensions, Disability Living Allowance Agency, Corporate Bankers, Core Managers, Clients, Residential Homes, Housing Associations, Police and Coroners, Debt Collection Agencies, Client, next of kin, Solicitors Law and Governance, Department of working pensions, Court of Protection and the Office of the Public Guardian, Social workers and various other professionals.

Other Key Features of the role

- Work is office based with the ability to work from home.

Employee Signature:	Print Name:
Date:	
Team Managers Signature:	Print Name:
Date:	