

Job description

Job title: Direct Payments Officer
Grade: Level 1 – Dorset Council Grade 6
 Level 2 – Dorset Council Grade 8
Job evaluation reference: FN609 a/b
Job family: Financial and Commercial Services

Purpose and impact

1. To ensure clients receive the correct funding on time and that they are advised of their obligations. Provide advice and guidance to clients and social care team.
2. To ensure that Dorset Council funds for Direct Payments are spend appropriately.
3. To ensure repayment to Dorset Council of unused funds, overpayments or inappropriately spent funds given in Direct Payments.

Additionally at Level 2:

4. To supervise the Level 1 Direct Payments Officers.
5. To have responsibility for training and mentoring all staff within the team and dealing with more complex cases, including home visits where appropriate.
6. To carry out accuracy checks on Level 1 Direct Payments Officers.
7. To provide training to Social Care Teams when required.

Key responsibilities

1. Accurately processing work steps on Mosaic for Direct Payments and communicating to service users of their payments.
2. Assist in putting in place Direct payment legal agreements.
3. Deal with routine correspondence relating to service users on the caseload.
4. Recovering overpayments, excess funds and underpayment of service user contributions relating to Direct Payments
5. Obtain and verify the financial information necessary to carry out Direct Payment financial reviews by post or email and to ensure the service user contribution is paid in accordance with Care Act Legislation and Directorate's charging policy.
6. Be familiar with the Care Act legislation and the Directorate's charging policy for all services and be able to interpret legislation.
7. Understand the relationship between employment law and Direct Payments.
8. Maintain up to date knowledge of state benefit entitlement and changes to legislation.
9. Notify service users of their assessed contribution and how that impacts on their Direct Payments.
10. Be aware of the possibility of deprivation of assets or income of service users and report to the Financial Assessment Team Manager any situations that require further investigation.
11. To interpret information and respond to queries raised by service users, colleagues within Dorset Council and external organisations in respect of Direct Payments and other financial related issues as appropriate.
12. Any other lesser or comparable duties as required by the Direct Payments Team Leader.





Additionally at Level 2:

13. Supervise the Level 1 Direct Payments Officers, to review performance and set targets for work completion.
14. Act as mentor to new or inexperienced staff ensuring that full and comprehensive training is given in accordance with the Team Leader. Presenting Training sessions for Social Care Team on a regular basis.
15. Ensure that 10% accuracy checks are carried out on Level 1 Direct Payment Officers and any remedial training is given.
16. Communicate to service users and/or their appointed agent, advice and guidance on how to manage the direct payment account. Where appropriate explaining complex financial reconciliations in a simplified format.
17. Be responsible for managing and reconciliation of payment runs adhering to department policies of evidencing backdated payments.
18. Liaise with, and provide training, information and support to, colleagues within People - Adults, (locality teams, day services and County Hall), Income Section, Legal Services, Accounts Payable/Receivable and Contract Providers to ensure that a seamless service is provided to all colleagues, service users and customers.
19. Have a deeper knowledge and understanding of employment law and the Care Act legislation regarding Direct Payments and keeping up to date with all changes to policy and legislation.
20. Investigate and report any suspicions of financial abuse or fraud to the Financial Assessments Team Manager.
21. Deal with more complex financial reconciliations relating to service users on the caseload and communication of results. Making best interest/good judgement decisions on a case by case basis ensuring best outcome and how to solve risks of care package breakdown.
22. Develop and maintain management information systems as required, understanding the relationships between various systems.

NB: The duties and responsibilities of this post are not restrictive, and the post holder may be required on occasion to undertake other duties. This will not substantially change the nature of the post.

Supervision and management

23. Reporting to: Direct Payments Team Leader
24. Responsibility for: There will be some supervision and management responsibility at Level 2.

Other factors

25. Personal computers, shared printers, copiers etc.
26. Responsible for ensuring data quality and the integrity of management information through the proper use and safeguarding of data and record system both manual and computerised.
27. The post holder will be based in County Hall, Dorchester.



Additionally at Level 2:

28. There may be a need to visit service users in their own homes, in hospital settings or local offices.

Progression in Post

29. Progression from Level 1 to Level 2 is on the basis of demonstration of the full range of skills, experience and knowledge set out in the person specification and context statement.

Our values

Our values act as guiding principles, defining what we believe is important in the ways we work together. Our values are Respect, Together, Accountability, Openness and Curiosity. You will need to be able to demonstrate these values in action through the way you work, regardless of your role within the organisation. Information about our values can be found on our website.



Person specification

Your application will be assessed based on your demonstration of how you fulfil the following criteria: you should include clear examples of how you meet these criteria within your application form and during the assessment process.

Essential

Essential criteria are the minimum requirement for the above post and will be assessed through a combination of your application form, assessment, interview and references (as specified below). We will require evidence of the qualifications, training or registrations listed below.

Qualifications, training or registrations Required by law or essential to the performance of the role or both	Assessed through:
1. Minimum of 2 A-Levels or equivalent qualification and/or equivalent experience	Application form
Additionally at Level 2:	Application form
2. Degree or equivalent qualification and/or equivalent experience	
Experience	
3. Relevant practical experience	Application form
4. Experience of working with customers	Application form
5. Experience of communicating with a wide range of people in order to obtain specific, detailed and accurate information	Application form
6. Demonstrable experience of completing and processing forms in accordance with pre-defined procedures	Application form
Additionally at Level 2:	Application form
7. Proven experience of working in a financial services environment	Application form
8. Experience of communicating with a wide range of people in order to obtain specific, detailed and accurate information	Application form
9. Significant experience of dealing with customers	Application form
10. Experience of dealing with complainants	Application form
11. Proven experience of processing workflows and monitoring of direct payment accounts	Application form
Knowledge	
12. Good knowledge of office practices and procedures	Application form Interview Assessment
13. Good and up to date knowledge of IT including Word and Excel	Application form Interview Assessment
14. Understanding of financial procedures	Application form Interview Assessment
Additionally at Level 2	
15. Up to date and comprehensive knowledge of Care Act Legislation	Application form Interview Assessment



Skills and abilities	
16. Good inter-personal skills	Interview Assessment
17. Effective written and oral communication, including listening and enquiry techniques	Interview Assessment
18. Ability to interpret legislation and to simplify this to give advice to others	Interview Assessment
19. Ability to retain information	Interview Assessment
20. Ability to produce accurate work	Interview Assessment
21. Ability to plan, prioritise and organise work effectively with minimum supervision	Interview Assessment
22. Ability to meet deadlines/timescales and to work under pressure	Interview Assessment
23. Ability to adopt a systematic approach in the completion and processing of claims, following established procedures	Interview Assessment
24. Ability to undertake numerical calculations appropriate to the post	Interview Assessment
25. Ability to cope with difficult situations effectively	Interview Assessment
26. Ability to positively embrace change, demonstrate flexibility and a willingness to take on new ideas and ways of working	Interview Assessment
27. Ability to work as part of a team	Interview Assessment
Additionally at Level 2	
28. Ability to negotiate and persuade	Interview Assessment
Our values	
29. Respect	Interview Assessment
30. Together	Interview Assessment
31. Accountability	Interview Assessment
32. Openness	Interview Assessment
33. Curiosity	Interview Assessment
Other	
34. Ability to fulfil the travel requirements of the post	Application form
35. Ability to use initiative and have an investigative manner	Application form

Desirable



Desirable criteria will be used in the event of multiple applicants meeting the minimum essential requirements and if applicable, will be assessed through a combination of your application form, assessment, interview and references (as specified below). If you meet the desirable criteria, we will require evidence of the qualifications, training or registrations listed below.

Experience	
36. Previous experience of working with Direct Payments	Application form
37. Experience of staff supervision	Application form
38. Experience of financial audit and personal accounts	Application form
39. Experience of dealing with vulnerable/older people	Application form
Knowledge	
40. Up to date knowledge of The Care Act Legislation and Local Authority	Application form Interview Assessment
41. Up to date knowledge of the welfare benefit system and benefit entitlements	Application form Interview Assessment

Approval

Manager's job title: Christopher Watkins, Financial Support Manager

Date: March 2021

