

Post Specification

Post Specification - Key Information

- **Post Title: Direct Payment Officer**
- **Date: August 2025**
- **Post Group Number: 8298**
- **Job Family: Organisational Support**
- **Job Family Role Profile: OS7**
- **Final Grade: 8**

To be read in conjunction with the job family role profile.

Service Area Description

The core purpose of the Community Finance Service is to work alongside Adult Social Care & support operations to deliver statutory requirements on behalf of the Council in a fair and equitable way in line with National Legislation and Local Policy.

The role of the Community Finance team is to ensure that customers are accurately financially assessed for any chargeable services delivered through the Council to meet their eligible care and support needs under The Care Act 2014. The team provide support, information and advice to ensure that customers are maximising their benefits, accessing direct payments where eligible and utilising them in accordance with local policy. They will also assist customers to gather the financial information required and provide advice and support to the customer and/or their representatives on any issue associated with charging for care and support.

The team works closely with colleagues and other agencies such as Office of the Public Guardian (OPG), Health Partners and The Court of Protection to identify and take appropriate action where possible financial abuse or intentional deprivation has occurred, to implement debt recovery procedures where necessary to ensure income due to the Council is collected in a timely manner. Work will also be undertaken with the Department of Work and Pensions (DWP) in relation to benefit claims, safeguarding and appropriate authority.

The Service ensures that appropriate reclaims are made from other organisations where packages of care may be jointly funded or where the Council have agreed to contract on behalf of another organisation; for example Section 117 After Care provisioned on behalf of Health partners.

Reclaims are made on a regular basis to mitigate against financial risk to the Council.

Purpose of this Post

- Directly supporting customers who receive chargeable services through the Council in a holistic manner and to ensure that customers are charged according to the service received.
- Monitoring and reconciling Direct Payment accounts using agreed procedures and systems to ensure an efficient and effective service for customers across the Council.
- Ensuring that joint funded or commissioned care through a partner organisation is reclaimed on a regular basis in accordance with agreed procedures and systems to safeguard the Council's financial position.

Key Job Specific Accountabilities

- Respond appropriately to customers or their representatives who are providing information or have queries about the services that they have been billed for, collating and recording the information. Ensure customers are kept informed of any action required.
- To visit customers in receipt of Direct Payments to offer advice and collect the information required to enable reconciliation of accounts.
- Record and maintain service user personal and financial information, in a timely and accurate way to provide precise care management records, to enable accurate financial reclaim and recovery transactions and to supply high quality data for management information processes.
- Support practitioners and other colleagues in providing advice on Direct Payment operational process and viability. To assist with reviews in making information available and offering joint visits and to attend case conferences/safeguarding meetings where necessary.
- Monitor income and expenditure for recipients of Direct Payments to ensure that the Direct Payment is properly accounted for and to raise with Social Workers where usage is outside the agreed plan.
- Reconcile and monitor Direct Payments in line with support planning arrangements so that accurate payments are made, continuity of service is maintained, service user contributions recovered, and value for money is achieved. Liaise with Direct Payment users or their representatives as necessary.
- Ensuring information identified as pertinent to the assessment and to the support planning processes is provided to the appropriate person, referring to safeguarding procedures as necessary, to facilitate the review process.
- Update systems to ensure the accuracy of the information held can be interrogated by managers and teams, to minimise the vulnerability of customers and facilitate an improving performance agenda. To contribute to the delivery of continually improved data quality.
- Maintain records within designated file structures ensuring information is accessible to staff whilst remaining secure. Conform to the principles of the data protection act as prescribed in Council and Directorate policies by ensuring information is stored, archived and destroyed in a timely and confidential manner.
- Responsibility for prioritising own workload, working to deadlines and on own initiative with the ability to see a task through from start to finish, ensuring pending issues are dealt with in an efficient and timely manner.
- Contribute to the development of the service through improvement work to enable shared knowledge and experience in the organisation to benefit the service.

Please note: Annual targets will be discussed during the appraisal process.

Key Facts and Figures of the Post

- **Budget Responsibilities:** No direct budget responsibility.
- **Staff Management Responsibilities:** Promote Direct Payments through the provision of training to colleagues and external agencies.
- **Other:** None

Essential Criteria

- **Qualifications:**
- 5 GCSE's at C grade or above including English and Mathematics, or an equivalent level qualification.
- **Knowledge:**
- Good working knowledge of administrative systems and ability to follow established procedures.
- **Experience:**
- Relevant recent experience working in an administrative or financial office environment.
- Use of IT applications including databases, word processing, spreadsheets and internet within an office environment.
- **Expertise:**
- Ability to develop and maintain accurate systems.
- Ability to handle, analyse and interpret complex information accurately and with attention to detail.
- Ability to communicate effectively orally and in writing with all levels of the organisation, customers and external agencies.
- Understanding of the customer perspective.
- Commitment to concept of Customer Care.

Disclosure and Barring Service (DBS) Checks

- This post requires a DBS check.
- The level of check required is *(remove others not required)*:
 - DBS Basic

Job Working Circumstances

- **Emotional Demands:**
- Working with vulnerable / distressed service users and/or families, including lone working out in the community, discussing sensitive topics in relation to personal care and support and financial affairs.
- **Physical Demands:**
- Covering the Council's area of responsibility will require travel across the area from time to time.
- **Working Conditions:** Office based with some travel.
- **Other Factors:**
- Ability to work independently and in partnership.
- Ability to deal with conflicting priorities and demands and to prioritise workload within strict deadlines.
- Organisational skills
- Ability to work flexibly as part of a team.
- Able to maintain confidentiality at all times