

Post Specification

Date	June 2024
Post Group Number	1948
Post Title	Client Affairs Administrator
Job Family	Business Support
Job Family Role Profile	BS8
Final Grade	Grade 8

To be read in conjunction with the job family role profile

Service Area description
Providing a specialist function on behalf of the Authorised Officer for Property and Financial Affairs, with responsibility for the delegated management of customer finances as directed by Court of Protection, adhering to the legal, regulatory, and Council requirements specific to the functions of the Client Affairs Team.
Purpose of this post
On behalf of the Authorised Officer for Property and Affairs Deputyships for Westmorland and Furness Council, administer effectively and efficiently individual customers' finances in accordance with the Court of Protection rules, OPG Deputy Standards, the Mental Capacity Act 2005, the Trustee Act 2000 and Departmental procedures and guidelines. Cases may start from aged 18, until the individual's death. The postholder will administer financial decisions on behalf of the customer that they are unable to make for themselves. This will include the day to day administration of the customers' finances, including claiming Department of Work & Pensions means and needs based benefits.
Key job specific accountabilities
<ol style="list-style-type: none"> 1. Liaise with the customer's family, carers, and their legal representatives to encourage them to apply to the Court of Protection where appropriate. 2. Obtain information to determine if an application to the Court of Protection is required. 3. Prepare and lodge applications with the Court on behalf of the authorised officer, ensuring they are accurate and timely. 4. Report and liaise with the Office of the Public Guardian to ensure the financial affairs of the customer are protected. 5. Ensure all Court orders issued by the Court of Protection are correctly administered within agreed procedures and timescales. 6. Advise members of staff, customers, providers, and members of the public, regarding the Court of Protection. 7. Arrange for the transfer of the management of the customers finances to the correct person within agreed procedures and timescales when the authorised officer is no longer responsible. 8. Administer the financial affairs of those persons for whom the authorised officer has been appointed, ensuring that the obligations of this function are performed in accordance with relevant Court Order or appropriate legislation and Departmental procedures and guidelines. 9. Ensure correct income and/or benefits are claimed and received for service users. 10. Collaborate in development of new systems
Please note annual targets will be discussed during the appraisal process
Key facts and figures of the post

Budget Responsibilities	<ul style="list-style-type: none"> • N/A
Staff Management Responsibilities	<ul style="list-style-type: none"> • N/A
Other	<ul style="list-style-type: none"> • N/A
Essential Criteria - Qualifications, knowledge, experience and expertise	
<ul style="list-style-type: none"> • GCSE grade C or above to include Maths and English, or equivalent qualifications, or relevant demonstrable experience • Working knowledge of using IT applications, databases, advanced spreadsheets, and word processing • Relevant experience of working in personal financial management • Excellent communication skills both verbal and written and including good telephone manner • Ability to work under pressure to meet strict deadlines set by DWP, OPG and internal procedures • Ability to plan and prioritise own workload • Ability to produce accurate work • Ability to work on own initiative as well as part of a team • Ability to take appropriate level of responsibility • Appropriate handling of confidential information • Ability to identify problems and provide solutions • Ability to show sensitivity with customers, families, and carer providers • Knowledge of the role of Adult Social Care and Local Government 	
Disclosure and Barring Service – DBS Checks	
<ul style="list-style-type: none"> • This post require a DBS check. • The level of check required is: <ul style="list-style-type: none"> ○ DBS Enhanced – Adults 	
Job working circumstances	
Emotional Demands	<p>Dealing with distressing and challenging behaviour in situations with families or acquaintances in limited cases, where customers may have a mental health illness.</p> <ul style="list-style-type: none"> • Dealing with the sense of loss on the death of customers for whom you have acted and the difficult situation of informing family and dealing with finalising the customers affairs.
Physical Demands	<ul style="list-style-type: none"> • None
Working Conditions	<ul style="list-style-type: none"> • Agile working
Other Factors	