

JOB DESCRIPTION

Job information as shown on organisation chart

Job Title: Appointee and Court Deputy Officer	Post No:	Hoople Band: C
Service: Financial Services	Section: Technical and Project Finance	Location: Nelson House

Organisational information:

Responsible to: Senior Assistant Accountant – Cash Management

Key relationships/Functional links with:

Court of Protection; Office of the Public Guardian; Department of Work and Pensions; the holder of the office of Court Appointed Deputy for Herefordshire Council; Treasury Solicitors Office; Resources Section; HM Revenue & Customs; Estate Agents; Solicitors; Financial Institutions; Legal Department; ILF; APAD; Adult Protection Coordinator; Police; Social Workers; Social Care Team Managers; Other Local Authorities; Social Care Accountancy Team; PCT; Service Users and their representatives; Residential/Nursing Homes.

Main Purpose of Job:

To Manage the financial affairs of service users that has been medically assessed as lacking mental capacity and may be vulnerable to financial abuse.

Main Responsibilities / Accountabilities:

The jobholder will be expected to complete the responsibilities / accountabilities effectively in order to deliver the key objectives of the organisation

- To safeguard the finances of vulnerable service users who are lacking mental capacity, by making applications to the Court of Protection on behalf of the Deputy as instructed by the Senior Team Leader
- To apply to the Department of Work and Pensions to become Appointee for the benefits of clients that lack mental capacity but have limited personal income and assets
- To manage the financial affairs of the clients for whom we have Appointee or Deputyship responsibility, ensuring that income is maximised, liabilities are settled and capital assets are invested and/or liquidated appropriately in accordance with the Order issued by the Court of Protection
- To liaise with the client, carers and social care staff to ensure that you act in the best interests of the client at all times, wherever possible establishing the clients likely wishes or intentions
- To abide by Court of Protection Orders and any regulations set by that department
- To act in accordance with the requirements of the Mental Capacity Act 2005
- To ensure that all transactions comply with financial regulations
- To keep abreast with changes in legislation that may affect Appointees and Deputyships.
- To produce, collate and assist with provision of information/data as required

- Continually review and evaluate administrative processes ensuring they are appropriate and represent best practice
- Work to agreed standards, ensuring personal development, and work within the Councils values

Have awareness of equality and diversity issues as they relate to the role, and comply with health and safety

Job Activities:	Frequency
<ul style="list-style-type: none"> • Make applications for Deputyship to the Court of Protection on behalf of the Deputy. Collating all necessary information and liaising with the social worker or adult protection team involved in the case, and conducting any enquiries necessary for completion of the application 	As and when
<ul style="list-style-type: none"> • Open bank accounts for new Appointee and Deputyship clients 	As and when
<ul style="list-style-type: none"> • Make payments from individual bank accounts in respect of expenditure incurred by Appointee and Deputyship clients 	Daily
<ul style="list-style-type: none"> • Pay income received in respect of Appointee and Deputyship clients into individual bank accounts 	Daily
<ul style="list-style-type: none"> • Ensure that any large sums of money are correctly invested for the maximum possible benefit of the Deputyship client, seeking best advice from a Financial Advisor if necessary. 	As and when
<ul style="list-style-type: none"> • Ensure that any capital assets are liquidated in advance of a Deputyship client's cash assets diminishing to a level that will prevent settlement of liabilities 	As and when
<ul style="list-style-type: none"> • Complete Annual Accounts on behalf of each Deputyship client for submission to the Office of the Public Guardian 	Annually
<ul style="list-style-type: none"> • Complete Annual Self-Assessment Tax Returns 	Annually
<ul style="list-style-type: none"> • Liaise with the Court of Protection and Office of the Public Guardian to establish and safeguard the best interests of the receivership client 	As and when
<ul style="list-style-type: none"> • Apply to the Department of Work and Pensions to assume Appointeeship responsibility for the benefit income of clients that lack mental capacity but have limited personal income and assets 	As and when
<ul style="list-style-type: none"> • Prepare and check invoices for Appointee and Deputyship expenditure for payment from the clients bank accounts 	Daily
<ul style="list-style-type: none"> • Liaise with next of kin/executor/solicitor on death of clients. 	As and when
Job Activities continued:	
<ul style="list-style-type: none"> • Ensure all financial transactions are correctly recorded on the financial system, liaising with the Accountancy Section as necessary 	Monthly
<ul style="list-style-type: none"> • Comply with the Council's year-end requirements, particularly with respect to closing down holding accounts and moving balances in to the next financial year 	Annually
<ul style="list-style-type: none"> • Maintain records of payments and receipts for Appointee and Deputyship clients in the Client Property and Finance System (CASPAR) 	Daily

<ul style="list-style-type: none"> • Reconcile the records of payments and receipts on the Client Property and Finance System (CASPAR) to clients bank statements • Review service users' entitlement to benefits on a regular basis and apply for additional benefits as necessary • Liaise with social care teams, residential homes and service users regarding any personal allowance that may be required • Engage in correspondence and answer enquiries as necessary in relation to the financial affairs of the client • Visit the clients as necessary to explain the Appointee or Deputyship process and to establish their wishes, intentions and needs • Training and advice for the social care teams on Appointee and Deputyship • Continually review procedures to ensure efficiency, adherence to Court of Protection requirements and financial regulations. Maintain and update a procedure manual as necessary • To keep abreast with changes in legislation that may affect Appointees and Deputyships • To follow the relevant procedures for ensuring that information and data is collected and recorded accurately thus enabling the production of reliable analyses and reports 	<p>Monthly (At least) Annually</p> <p>As and when</p> <p>Daily</p> <p>(At least) Annually</p> <p>As and when</p> <p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p>
<p>Other information:</p>	

Manager Signature:		Date:	
Manager Name:		Job title:	

Date Job Description last reviewed: 01/03/2022