| Role Structure | Role Details  |
| --- | --- |
| Directorate: | Community Wellbeing |
| Grade: | HC06 |
| Location: | Plough Lane, Hereford |
| Responsible to: | Court of Protection Team Leader |

# Job Description

# Appointee & Court

#  Deputy Officer

## Main purpose of the role

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

| Key Duties and Responsibilities | Frequency of Task |
| --- | --- |
| * 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 required
 |
| * Open bank accounts for new Appointee and Deputyship clients
 | * As required
 |
| * Make payments from individual bank accounts in respect of expenditure incurred by Appointee and Deputyship clients
 | * Daily
 |
| * Pay income received in respect of Appointee and Deputyship clients into individual bank accounts
 | * Daily
 |
| * 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 required
 |
| * Complete Annual Accounts on behalf of each Deputyship client for submission to the Office of the Public Guardian
 | * Annually
 |
| * Complete Annual Self-Assessment Tax Returns
 | * Annually
 |
| * Liaise with the Court of Protection and Office of the Public Guardian to establish and safeguard the best interests of the deputyship client
 | * As required
 |
| * 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 required
 |
| * Prepare and check invoices for Appointee and Deputyship expenditure for payment from the clients bank accounts
 | * Daily
 |
| * Liaise with next of kin/executor/solicitor on death of clients.
 | * As required
 |
| * Reconcile the records of payments and receipts on the Client Property and Finance System (CASPAR) to clients bank statements
 | * Monthly
 |
| * Review service users’ entitlement to benefits on a regular basis and apply for additional benefits as necessary
 | * Annually (at least)
 |
| * Liaise with social care teams, residential homes and service users regarding any personal allowance that may be required
 | * As required
 |
| * Engage in correspondence and answer enquiries as necessary in relation to the financial affairs of the client
 | * Daily
 |
| * Visit the clients as necessary to explain the Appointee or Deputyship process and to establish their wishes, intentions and needs
 | * Annually (at least)
 |
| * Training and advice for the social care teams on Appointee and Deputyship
 | * As required
 |
| * Continually review procedures to ensure efficiency, adherence to Court of Protection requirements and financial regulations. Maintain and update a procedure manual as necessary
 | * Ongoing
 |
| * To keep abreast with changes in legislation that may affect Appointees and Deputyships
 | * Ongoing
 |
| * 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
 | * Ongoing
 |

**Person Specification**

| **Requirements** | **Essential or Desirable** | **Identified by****A – Application I – Interview** |
| --- | --- | --- |
| **Qualifications and Training** |
| * Maths/English at GSCE level or equivalent
 | Essential | A, I |
| * Effective user of Word, Excel and Outlook
 | Essential | A, I |
| **Experience & Knowledge** |
| * Experience of working within a Social Care environment
 | Desirable | A, I |
| * Proven track record of managing finance
 | Essential | A, I |
| * An understanding of financial regulations and recording systems
 | Desirable | A, I |
| * Experience of dealing with clients/customers/service users, including sensitive situations
 | Essential | A, I |
| * Experience of clerical/administrative work
 | Essential | A, I |
| * Experience of monitoring budgets
 | Desirable | A, I |
| **Skills and Abilities** |
| * Ability to work alone and take initiative where necessary within agreed boundaries
 | Essential | A, I |
| * Ability to convey information to a wide range of people from social care managers to service users that lack mental capacity
 | Essential | A, I |
| * Ability to prioritise and organise own workload to meet deadlines
 | Essential | A, I |
| * Good attention to detail
 | Essential | A, I |
| * Well organised and flexible approach to work
 | Essential | A, I |
| * Full UK Driving Licence and use of a car
 | Essential | A, I |
| * Ability to travel to meetings with staff and service users across the County
 | Essential | A, I |

All council staff have a duty to promote the welfare of children, young people, and adults with care and support needs at risk of abuse and neglect who cannot take steps to protect themselves. Ensuring you attend mandated safeguarding children and safeguarding adults training to enable you to recognise the concerning behavior, know how to talk about it, and consent/duty to share information effectively. You will also learn about the legalities and procedures the social care staff can take.

## Our Values and Behaviours

The council’s THRIVE core values are our guiding principles and beliefs that shape our culture and behaviour within the council. ​They help us to achieve our Council Plan vision “do our best for Herefordshire” acting as our DNA and the “way that we do things around here”. We expect all colleagues to act as a role model by living our values and setting an example for others. ​Our values strive to promote a thriving workforce by fostering a culture of trust, being honest and responsible, inclusive, valuing people and resources and leading with empathy.

**Trust -** Developing and maintaining relationships based on a culture of transparency and open communication. Supported by integrity and the confidence that you are reliable and fulfil commitments.

**Honesty -** Demonstrating truthfulness, integrity, and transparency in all communications, decisions, and relationships. Being trustworthy, reliable, and accountable for your actions. Acting with sincerity and fairness, even in challenging situations.

**Responsibility -** Taking ownership of individual and collective actions, decisions, and delivering on commitments. Being reliable, fulfilling obligations and being accountable for outcomes and results. Proactively contributing to the achievement of your own, the team and council goals.

**Inclusivity -** Embracing diversity, equity and inclusion by recognising and valuing the unique perspectives, backgrounds and experiences of our staff, customers and residents. Creating an environment where every individual is valued, respected and can belong.

**Value -** Upholding high standards, ethics and integrity to guide our actions and decisions. Demonstrating commitment to creating and delivering value in our work by recognising and appreciating each other, our resources, processes, customers, community and environment.

**Empathy -** Demonstrating a genuine and caring understanding of others' feelings, perspectives, and experiences. Listening attentively, acting with compassion, supporting with respect and kindness and considering the impact of our actions on others.