

ROLE PROFILE

Job family	Business Support	Role profile number	BS06-2238	Grade F
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Job purpose: Carry out a range of administrative duties which will support the successful delivery of relevant services to internal and external customers.

Grade F posts are higher in 'Creativity & Innovation' with the requirement for on-going problem solving but within clear defined procedures where support is readily available from senior colleagues. Grade F posts are also higher in 'Consequences' where decisions are made based on a range of established solutions which have a material impact on the work of the team or service area.

Factor	Relevant Job Information
Supervision and/or Management of People	No management of staff. No supervisory responsibility other than providing guidance and support to colleagues.
Indicative qualifications	A levels / National Diploma or equivalent experience/skills. ITQ 2 or equivalent ICT skills and abilities.
Knowledge and Skills	Previous relevant and practical experience. A thorough understanding of relevant procedures and working practices. Good knowledge of specialist function relevant to service area. Excellent ICT skills including use of Microsoft applications and specialist systems Attention to detail. Good organisational skills and the ability to prioritise workloads.
Creativity and Innovation	Work on own initiative to manage own activities. Creativity and problem solving is a feature of the job, exercised within general guidelines of the service area. Research and analysis of information to highlight and prioritise issues for further investigation May research and resolve problems as part of a support team.
Contacts and Relationships	Provide advice and guidance where information is less well established and where situations may not be straightforward. Deal with people at all levels confidently, sensitively and diplomatically. Be first point of contact on a range of queries from internal / external customers, may be dealing with challenging situations where influence could be required. Contacts will include: Colleagues, customers, members of the public, and stakeholders.
Decisions – Discretion & Consequences	Work is carried out following the framework of accessible guidelines and processes. Decisions are made based on a range of established practices The consequences of the decisions will have a material effect on the service. Issues are highlighted and solutions are recommended on processes and procedures specific to the role. Devise, create, maintain and manipulate data management systems. Analyse standard data and provide reports to customers, team members and managers with recommendations. Carry out research for projects from a range of sources as directed by the line manager or other team members
Resources	Little or no responsibility for physical or financial resources
Work Demands	Work subject to interruptions and at times may be competing demands of work priorities
Work Environment	Office based, but may involve some travelling to other council buildings
Our Identity	Our Identity sets out who we are and provides a shared understanding of how we are all expected to lead, work and act with each other, our partners and our residents to deliver our services and build stronger communities. They enable us to continually evolve and adapt to meet the changing needs of our residents and ensure that we continue to deliver great services and make a difference to the people of Wiltshire. All of us are expected to demonstrate the ten elements of Our Identity in how we work to shape and create the organisation we want to be part of. It should influence our decisions, activities, projects and ways of working
Health & Safety	All employees are required to carry out all duties and responsibilities with reasonable care for the health and safety of self and others and report any potential hazards or unsafe practices to their line manager
Equalities	Wiltshire council is committed to ensuring employees do not discriminate against colleagues, suppliers or third parties at work or harass or victimise others. Incidents of discrimination at work are taken seriously and employees are encouraged to report incidents via their manager or anonymously via the whistleblowing policy .
Authority to work in the UK	All employees must have the legal authority to work in the UK. Non-EU nationals must have the relevant approval to work in the UK from the UK Border Agency. Copies of all documents provided as proof of identity are retained for our records, by providing these proofs the council will treat this as consent.

The above profile is intended to describe the general nature and level of work performed by employees in this role and does not detail a list of all duties and responsibilities. The Council reserves the right to amend this role profile as necessary.

ROLE DESCRIPTION

Role description:	Finance Assistant	
Role profile family:	Business Support	
Role profile number and grade:	BS06-2238	Grade F
Number of posts:	15	
Service/Team:	Business Services Finance	
Reports to:	Adult Care Finance Manager	

Job Family overview

Business Support job family overview:

Delivery of administration, information processing and business services to support the Council

- Processes regular transactions via established procedures
- Undertakes regularly occurring event based tasks and duties
- Delivery of ongoing processes and procedures including specialist areas
- Understands and responds to real time queries
- Provide routine and standard advice and guidance on the Councils processes and procedures

Service / Function Context

The overall responsibilities of the service/function are:

The post sits within the wider Business Services Finance Team. The team is comprised of three function areas: Accounts Payable, Adult Care Finance and Insurance.

The Accounts Payable team is responsible for all payments to suppliers, partner organisations and individuals for Wiltshire Council (with the exception of the council's own payroll).

The Adult Care Finance team make payments and collect income for the Adult Care teams. Payments are made to residential and domiciliary care providers, and from individuals.

The insurance team deal with all aspects of insurance for the council., handling claims received, recovering money from third parties on behalf of council services; and offering advice and support for staff on insurance matters and risk management.

The function of this team is to ensure all payments for funding are made within a given timescale, payments are required to be accurate and appropriate. Failure to do so has a monetary impact to the Council as well as reputational risk

Job Purpose

The purpose of the role is to provide financial guidance and support across the adult social care and the commissioning and brokerage function. The role holder is required to understand the end to end financial process and provider services in order to make informed decisions, being solution focused enabling delivery of good quality and accurate outcomes.

Within the role is the requirement to fact find and make informed decisions by assessing risk, failure to work effectively may lead to a backlog of invoices or put funded support (customers) at risk of the provider withdrawing services. There is also a risk of overpayments, underpayment, the requirement for compensation, increased complaints from customers, the Local Government and Social Care Ombudsman and MP enquires.

This role highlights creates and amends process guidance and procedure, updates, communicates changes and trains and supports colleague. This role works extensively with the programme office to carry out research for projects from a range of sources and IT to enable the business need to be fully supported. Projects that are current include Implementation of ControCC , the Net to Gross project incorporating effective debt collection procedures. Engagement and Partnership working with DWP regarding electronic process for data capture. The Migration of the Deferred Payment Process to the new finance system.

Specific duties and responsibilities include:

- Use and maintain the Adult Care database: check funding requests; enter data relating to packages of care; review and write case records; manage personal workload through diary activities and messages.
- Use the Council's financial system: Create and amend purchase orders; release and make payments; raise credit note requests to recover overpayments; Raise invoices to providers and individuals; interrogate data to find and resolve issues including problems with payments made; prepare accounting journals.
- Use data from financial systems and MSExcel to produce financial calculations and carry out reconciliations of payments and receipts relating to client's care. This requires use of information held on several systems and knowledge of book keeping principles to determine reasons for discrepancies in account reconciliations where numerous types of transactions have occurred.
- Consequences of poor interpretation or input of data could result in lack of transparency of budget information, an increased level of under or over payments, lack of accuracy of the Council's budget position, increased complaints as well as the requirement of senior corporate involvement.
- Participate in regular data checking and data cleansing, ensuring that all data is accurate and up-to-date. This involves entering data into templates, developing regular or one-off routines and determining the reasons for errors, using various systems to do so. Failure to ensure that data is accurate could result in errors on accounts and could mean overpaid funds are unable to be recovered or individuals are not paid monies due.
- Undertake debt recovery work to recover money owed to the Council. This will include telephoning organisations and members of the public to chase debt; preparing documents for legal action and investigative work to identify and locate debtors.
- Answer telephone calls from external providers and members of the public on queries

surrounding general adult care policies, utilising agreed processes to explain reason for payment delay and to provide advice and updates on potential outcomes. Good quality communication and timely outcomes supports the Council's partnership working with providers avoiding issues with providers wishing to be part of the market place and do business with the Council.

- Write letters to providers and clients/clients' representatives, explaining complex financial transactions clearly and effectively. Sometimes a template can be used but often a letter will need to be drafted and written using sensitivity and tact, for example when writing to the recently bereaved regarding debt.
- Work across the organisation to develop process and procedure which is outside of the team but will support best working practices, support the end to end process, manage risk, lessen the impact of over and under payments, enhance good quality reporting and enable accurate projections in relation to financial issues.
- Administer deferred payment loans and other loans: initiate contact with the client or their representative; act as case manager for all financial aspects of the process; work with other departments within the Council to set up and monitor the loan; prepare financial statements; recover the loan and ensure that all money is reconciled and repaid.
- Be aware of established practices, apply high level decision making without the intervention of senior managers. Responsible for information gathering and independent decision making ensuring financial risk to the Council is minimised, and clients and providers are fairly treated throughout. An example of this would be when the Council needs to take over debt, or if a deferred payment agreement criteria has been met. Lack of decision making could result in a provider going into liquidation and crisis management of customers for ASC,
- Be aware of Adult Care legislation (including the Care Act and the Mental Capacity Act) where it relates to financial matters, as notified to you by your manager or other trainer.
- Work independently, taking responsibility for the accuracy of your work and making decisions on how to resolve issues, selecting the correct approach with due regard to potential safeguarding concerns, the reputation of the council, and the vulnerable nature of the client base.
- Demonstrate adaptability and flexibility, using systems thinking techniques to continually improve processes and embrace the evolving nature of the job within the wider contexts of changes to Council policy and Adult Care practice.

Specific requirements for this post:

- None

Person Specification

Specific qualifications, knowledge, and skills required for this role:

Essential

- A levels / National Diploma in finance / mathematics or other related subject or equivalent experience/skills in a finance related field or adult care finance team.
- Good understanding of the Care Act 2014, which incorporates the Mental Health Capacity Act.
- Working knowledge of the role of the Power of Attorney and the process of Deputyship.
- Knowledge of the relevant adult care system or equivalent ICT knowledge or experience.
- Experience of working under pressure and to tight deadlines.
- High standard of literacy, numeracy.
- Excellent telephone manner, ability to communicate clearly and concisely with customers, both internal and external.
- Expert listening and communication skills to enable customers, provider and colleagues to work within process.
- Experience of handling difficult telephone calls.
- Experience using Microsoft Outlook, Word and particularly Excel.
- Good organisational skills with the ability to work on own initiative.
- Proven ability to plan and prioritise own workload and work to strict deadlines, confident in seeking advice when appropriate.
- Committed to providing excellent customer service.

Desirable

- Knowledge of SAP SRM and SAP GUI or equivalent
- Experience in the manipulation of complex spreadsheets or databases.
- Experience of working within local government.
- Experience of working in a finance environment.
- Experience of working with the general public

Career graded posts

This post does not form part of a career grade.

Supporting information

Driving classification									
Occasional driver A valid UK driving licence is not required. Occasionally may need to travel to different locations in order to undertake the duties of the role.	<input checked="" type="checkbox"/>								
Regular Driver Must hold a valid UK driving licence (with no more than 6 penalty points) and have access to either their own car or a pool car in order to undertake the duties of the role unless other forms of transport are available and viable to perform the role, including public transport. Or a reasonable adjustment has been agreed.	<input type="checkbox"/>								
Required Driver Must hold a valid UK driving licence (with no more than 3 penalty points) and will drive a vehicle supplied by the Council in order to undertake the duties of the role.	<input type="checkbox"/>								
Employees should refer to the Corporate Driving at Work policy for further information.									
Driving trigger points									
The trigger points set out below, regarding driving licence points and at-fault accidents, apply to all staff who drive on council business.									
<table border="1"> <thead> <tr> <th>Trigger Points</th> <th>Corrective Driver Training Course or further action</th> <th>Additional corrective training if appropriate or further action</th> </tr> </thead> <tbody> <tr> <td>Points on driving licence</td> <td>6</td> <td>9</td> </tr> </tbody> </table>	Trigger Points	Corrective Driver Training Course or further action	Additional corrective training if appropriate or further action	Points on driving licence	6	9			
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At fault accidents within a two-year period (whether work or personal)	1	2	3						
Job applicants who drive must have 9 or less points on their driving licence, and must have less than 4 at fault accidents within a two-year period. If they meet the trigger points, they will be subject to the actions outlined in the table above.									
If holding a valid licence, occasional drivers will need to declare penalty points and no-fault accidents as requested. Depending on the role, decisions as to whether this might either affect appointment or require corrective driver training, will be made case by case.									

Political restriction	
This role is politically restricted. The job holder is not permitted to undertake political activity involving standing for election as a member of parliament, as a member of the Scottish or Welsh Parliaments, or be a local councillor. The job holder is furthermore not permitted to canvass on behalf of a political party or a person who is already, or who seeks to be, a candidate. In addition, they may not speak to the public or publish any written or artistic work that could give the impression they are advocating support for a political party.	<input type="checkbox"/>
This role is not politically restricted	<input checked="" type="checkbox"/>

Professional fees and related occupational costs	
As part of this role, or to support professional development, the job holder is required to be a member of a professional body or association. The job holder is responsible for payment of all professional fees, memberships, registrations or subscriptions and no reimbursement or contribution towards these will be provided by the council	<input type="checkbox"/>
This role does not have any professional or occupational membership requirements	<input checked="" type="checkbox"/>

Clearances – Disclosure & Barring Service (DBS)	
This role will be engaged in ‘regulated activity’ providing specific services relating to children or vulnerable adults and is subject to a Disclosure from the Disclosure and Barring Service.	<input type="checkbox"/>
This role is exempt from the Rehabilitation of Offenders Act 1974 and will require an Enhanced DBS check before appointment can be confirmed.	<input type="checkbox"/>
This role is exempt from the Rehabilitation of Offenders Act 1974 and will require a Standard DBS check	<input type="checkbox"/>
The role requires a Basic DBS check to check for convictions and cautions that are considered to be unspent under the terms of the Rehabilitation of Offenders Act 1974.	<input type="checkbox"/>
This role is not subject to a Disclosure from the Disclosure and Barring Service in order to undertake the duties of the role.	<input checked="" type="checkbox"/>

Clearances – Baseline Personnel Security Standard (BPSS)	
This role requires access to the UK government Public Services Network (PSN) and is subject to a BPSS check	<input type="checkbox"/>
This role is not subject to a BPSS check	<input checked="" type="checkbox"/>

Clearances – Non-Police Personnel Vetting (NPPV)	
This role requires working in partnership with the police, and/or having access to Police related systems and is subject to a NPPV check at level 2* . (*regular access to police premises and police information, intelligence and financial or operational assets. Occasional access to those deemed ‘secret’).	<input type="checkbox"/>
This role requires working in partnership with the police, and/or having access to Police related systems and is subject to a NPPV check at level 3* (*regular unsupervised access to police premises and/or access to police information and/or information systems and/or hard copy material either on police premises or by remote access up to “secret” level. A level 3 includes a check on you, your spouse/partner, co-residents, and all family members).	<input type="checkbox"/>
This role is not subject to a NPPV check	<input checked="" type="checkbox"/>

Safeguarding	
For all roles within Children's Services. Wiltshire Council is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and all staff are expected to share this commitment. You will be expected to report any concerns relating to the safeguarding of children, young people or vulnerable adults in accordance with agreed procedures. If your own conduct in relation to the safeguarding of children, young people or vulnerable adults gives cause for concern, the council's agreed child protection/vulnerable adults protection procedures will be followed.	<input type="checkbox"/>
For all roles within Adult Social Services. Wiltshire Council is committed to safeguarding and promoting the welfare of vulnerable adults and all staff working for the council are expected to share a commitment to this. You will be expected to report any concerns relating to the possible abuse of a vulnerable adult in accordance with the agreed interagency safeguarding adults' procedures. If your own conduct in relation to the safeguarding of vulnerable adults gives cause for concern, the council's agreed interagency safeguarding adults' procedures will be followed, alongside implementation of the council's disciplinary procedure. The job holder is accountable for their safeguarding of vulnerable adult responsibilities to their line manager.	<input type="checkbox"/>
For all other roles within the council. Wiltshire Council is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and all staff are expected to share this commitment. You will be expected to report any concerns relating to the safeguarding of children, young people or vulnerable adults in accordance with agreed procedures. If your own conduct in relation to the safeguarding of children, young people or vulnerable adults gives cause for concern, the council's agreed child protection/vulnerable adults protection procedures will be followed.	<input checked="" type="checkbox"/>