**ROLE PROFILE**

**Role Title:** Customer Liaison Officer

**Service Area:** Access to Adult Health and Social Care Team

**Directorate:**  People Directorate

**Accountable to:** Senior Practitioner Adult Social Care Access Team

**Grade:** E

**JE: JE1443 Competency Level:**

**Purpose of Job**

To provide as part of the Access to Adult Health and Social Care Team a customer service to the public and professionals contacting Adult Social Care by post, telephone or personal contact. Calls will be in relation to any aspect of health and social care which includes adult safeguarding and support to service users and their families.

To gather information to advise and refer onto agencies in the statutory, voluntary and independent sectors where requests for help fall outside the responsibilities of the Directorate. To have a good understanding of the Directorate policies, procedures and relevant legislation necessary to effectively carry out the duties of the post. To ensure accurate recording within Adult Social Care systems to support the decision making process.

**Key Objectives**

|  |  |
| --- | --- |
| 1 | To work as a key member of the Access to Adult Health and Social Care Team, providing advice, information and assistance to customers and referral agencies. |
| 2 | To recognise potentially emotional and stressful situations in relation to callers where there may be barriers to communication, such as communicating with people who exhibit signs of confusion, aggression or violence and to be aware of the relevant security measures. |
| 3 | To gather accurate information which forms the initial stages of the assessment process in order to identify the need for services and to ensure that an appropriate response is promptly made. To advise service users of eligibility criteria and the availability of support. To make recommendations of next actions for management review and sign off. |
| 4 | To input and gather information from safeguarding alerts. To make recommendations of next actions for management review and sign off. |
| 5 | To exercise judgement, analyse and resolve problems, providing non – clinical advice and appropriate sign posting. |
| 6 | Taking responsibility, where service users are assessed as not eligible for care services, to provide advice, information and advocacy support, finding solutions to the issues the service user presents and following up outcomes from advice given and establishing its success. |
| 7 | To input data and information including case notes on to any electronic database systems in use using knowledge of the computer base system, to deal with data enquiries. To contribute to the maintenance and accuracy of the information stored. |
| 8 | To carry out all tasks with due regard for the Council’s policies and procedures and to promote the principles of non-discriminatory practice. |
| 9 | Inputting accurate and precise financial information relating to care planning, service provision and service packages for recommendation and management review and sign off. |
| 10 | To co-ordinate internal processes in liaison with social workers, safeguarding team and external agencies and obtaining information from partner agencies i.e. Milton Keynes Hospital Foundation Trust, Community Health Services, Ambulance service, GPs, probation, district nurses, police, care providers and domestic violence services. Responsible for concluding queries from external agencies through reviewing data on recording systems – responding in line with data protection and confidentiality statement and the scope of external service provisions. |

**Scope**

The post holder will report to the Senior Practitioner.

The role is in direct contact with customers or their representatives via telephone, email, fax and face to face. The post holder will be expected to have highly developed customer service skills.

Through evaluative questioning to access customers’ circumstances in order to identify their need for services from the Council and other external agencies, as well as those contracted externally via the council, and to ensure that an appropriate accurate and solution focussed response is promptly made, in line with current criteria.

Advise customers and other professionals of internal policies and procedures and levels of individual need/eligibility criteria and the availability of services by the sharing of information through laid down procedure.

Recognise potentially stressful situations in relation to callers who may exhibit strong emotional responses including anger, aggression, violence or distress, needing to use a range of communication techniques in order to support and encourage positive engagement and interaction with members of the public.

Awareness of relevant security measures, including how to support lone workers in the community who may encounter risk situations and escalation to a manager.

The use and understanding of a multi-agency approach is essential to achieve satisfactory outcomes for the public, service users and their representatives.

The role is core to a seamless service user journey providing the first point of contact for service users, guiding and directing to appropriate health and social care resources, using information they have gathered.

Communicate at high level with both internal and external agencies.

Information is expected to be accurately recorded in a timely manner and be a high quality.

Manage own workload and take responsibility for producing work to agreed deadlines.

Work in a multi-agency manner to achieve a satisfactory outcome for the service users.

Daily communication and negotiating with professionals, health workers, service users and their families to ensure that services are provided in a timely, flexible and safe manner.

The role is in direct contact with service users or their representatives who are vulnerable or feeling under threat or at risk or potential risk.

Liaise with appropriate staff responsible for providing statutory returns and assist in providing information as required.

**Work Profile**

The post holder will be the first point of contact for taking and managing referral information to conclusion.

Responsibility for a wide variety of tasks which involves a working knowledge of computer based systems.

The post holder is required to accurately record data on to any electronic database systems in use and, using knowledge of the computer base system, to deal with data enquiries. To contribute to the maintenance and accuracy of the information stored and input to the maintaining up to date information on web pages.

The use of service based knowledge and self-initiative will make informed recommendations in relation to referring to relevant internal and external, local and national providers and organisations. A high level of understanding and awareness will be required, as will clear and concise written and oral responses.

An understanding of statutory processes, to complete a wide range of customer focussed services, taking responsibility for these across the whole service area i.e. identification of which team referrals into Adult Social Care are sent to.

Provide services which meet service user’s wide range of diverse requirements.

In collaboration with social workers undertake duties in line with safeguarding screening outcomes, which includes gathering additional information by phone or face to face, organising welfare visits, or assessment visits from social workers – reviewing information and incident reports from agencies such as the police, fire or ambulance service and by their knowledge of services recommending appropriate responses to social workers and managers.

Complete some administrative tasks, in line with Data Protection procedures, which can include initial screening of referrals, responding to requests for information, accessing records, management of social workers outlook calendars where urgent and critical appointments need to be booked, the administration and management of a respite booking system on behalf of the service area – liaising with team members in the service and external agencies. To provide daily information to Health & Social Care representatives regarding the availability of community resources.

The role holder will collect and compile regular and ad hoc data as directed by their manager and are expected to inform their manager of any issues in relation to success or failure of service delivery, possibly at times of high volume of contacts from the public and professionals.

The role holder will be required to work independently using decision making skills regarding the urgency of the enquiry for the service users. The role holder should also be able to work as a reliable member of the team. They will be required to work flexibly and manage their own workload effectively.

**PERSON SPECIFICATION**

**In this section the Skills, Knowledge, Qualification and Competency requirements to perform the role to a satisfactory standard are set out. The extent, nature and level of the role holder’s knowledge and skills should be specified**

**Awareness** some knowledge or skills sufficient to show aptitude and the ability to learn in the particular work area

**Significant**  knowledge and skills gained through practice and/or qualification sufficient to fulfil the role requirements

**Extensive** knowledge and skills gained through practice and/ or qualification to fulfil the role requirements and contribute to training others and developing policy and practice in the work area

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **PERSON SPECIFICATION** | **Examples specific to role** | **Required** | | **Level** | | | **Method of Assessment interview, testing, reference** |
| **Essential** | **Desirable** | **Awareness** | **Significant** | **Extensive** |
| **SKILLS AND KNOWLEDGE**  **Technical knowledge and qualifications** | Previous relevant experience in an administrative role  Ability to use IT systems to a high standard including excellent keyboard skills  Numerate and accurate, to inform others where appropriate  Employing the Councils standards of Plain English to create meaningful statements and a good general level of education | **√**  **√**  **√**  **√** |  | **√**  **√** | **√**  **√** |  | Application Form  Interview Test  Interview  Application Form |
| **Planning and organising work** | Able to work independently  Make decisions and take action as appropriate  Good organisational and administrative skills  Able to respond quickly to information, using own initiative and assessment of risk, with suggestions for outcomes | **√**  **√** |  | **√** | **√**  **√** |  | Interview  Interview Test |
| **Planning capacity and resources** | Able to work independently as well as working as a reliable team member a team requiring flexibility and the ability to manage your own workload effectively.  Refer service users to other services and to other agencies which might best meet the identified needs for services using excellent communication skills.  To collect and compile regular and ad hoc statistical data  Knowledge of local resources, preventative services and community based support services. | **√**  **√** | **√** | **√** | **√**  **√** |  | Application Form  Interview  Interview Test |
| **Influencing and interpersonal skills** | Able to communicate effectively at all levels  Self-motivated and able to demonstrate initiative  Demonstrate a good understanding of service user requirements and possess strong customer service skills.  Participate in team meetings  Ability to communicate verbally and in writing regarding complicated or sensitive information. | **√**  **√**  **√**  **√**  **√** | **√** |  | **√**  **√**  **√**  **√** |  | Interview  Application  Application |
| **PROBLEM-SOLVING**  **Using initiative to overcome problems** | Required to exercise judgement, analyse and resolve problems providing non-clinical advice.  Make suggestions and feedback to improve performance.  To facilitate daily decision making meetings in participation with the Team Manager/Senior Practitioner presenting details and updates of service users activity | **√** | **√**  **√** | **√** | **√**  **√**  **√** |  | Interview  Interview  Interview |
| **Managing risk** | Able to accurately assess/collate information in order to inform effective risk assessment.  Ability to understand crisis situations , where risks are increasing |  | **√**  **√** |  | **√**  **√** |  | Application  Application |
| **Managing change** | Understand of best practice  Committed to development the service. |  | **√**  **√** | **√**  **√** |  |  | Interview  Interview |
| **ACCOUNTABILITY and RESPONSIBILITY**  **Undertakes tasks without supervision** | Able to work autonomously  Exercise judgement, analyse and resolve problems providing non-clinical advice.  Commitment to uphold and promote the Council’s Equality policy in relation to service delivery and employment  Understanding of when to seek support and advice from a social worker or manager. | **√**  **√**  **√** | **√** |  | **√**  **√**  **√**  **√**  **√** |  | Interview  Interview  Interview |
| **Managing people** | Maintain confidentiality when dealing with service users, according to agreed procedures.  Knowledge of the services of Milton Keynes Council and its structures | **√** | **√** | **√**  **√**  **√** |  |  | Interview |

**COMPETENCIES REQUIRED – All post holders must be able to comply with the Council’s core competency requirements which include communication, respect for others, customer service, drive for results, delivering the promise and continuous personal development.**

**In addition for those posts with management responsibilities the competencies will include managing self and personal skills, providing direction, facilitating and managing change, working with people, using resources, achieving results, promoting policy, values and culture, customer service and health and safety.**

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |
| Signed Job holder | Signed Line Manager | Signed Service Head/ Assistant Director |  |
|  |  |  |  |
| Print Job Holder | Print Line Manager | Print Service Head/ Assistant Director | Date |