

ROLE PROFILE

Role Title: Charging Officer

Service Group: Adult Social Care & Health

Accountable to: Senior Assessment & Charging Officer

Grade: E

Date: 13.07.2017

JE code: JE1613

Competency Level: 2

Purpose of job (outline what, to whom and why)

To create invoices for assessed contributions due from service users for residential and non-residential adult social care services, and for standard non means-tested charges.

To manage deferred payment accounts, and issue statements and invoices in line with policy and guidance, liaising with the sundry debt team, solicitors and service users.

To read and interpret reports, analyse data, undertake reconciliations, and spot data errors. To maintain accurate data in excel spreadsheets and systems to produce accurate reports and statistical data

To ensure invoices are accurate and issued in line with timescales, and to respond appropriately to queries.

To work closely with financial assessment colleagues, and proactively resolve queries relating to invoices for new, revised and backdated assessments. To robustly maintain invoicing information, and produce reports for managers and financial assessment staff.

To maintain the integrity of the charging systems, and support system testing, changes, and upgrades. Other tasks relating to social care systems and invoicing, commensurate with the grading of the post.

Key Objectives (list what outcomes are essential)

1	Coordinate the charging of contributions for adult social care services. Ensure invoices are raised in an accurate and timely way, and appropriate entries are uploaded into the accounts system within timescales set, working in conjunction with charging officer colleague.
2	Maintain invoicing systems, and spreadsheets, and produce reports and statistical information for managers and financial assessment staff as required.
3	Be proactive in advancing improvements in invoicing processes, working closely with managers, colleagues and other relevant staff. Support process change for invoicing for top-ups. Continuously update knowledge and understanding as policy and procedural changes occur.
4	Collate contribution information from financial assessment staff, purchasing & procurement team, contracts, and providers. Ensure data in systems is accurate and up to date.
5	Maintain deferred payment agreement accounts, issue statements, apply relevant administration charges and interest, and raise invoices, as required. Request property valuations for deferred payment accounts, and obtain valuations from property services when these are not provided by the service user.
6	Manage own workload, embed customer service excellence within the team through contributing to the design of customer focussed processes, active participation in one to one meetings, team meetings, the appraisal process and own behaviours.
7	Work closely with debt recovery colleagues to ensure robust joined up approach, with accurate and timely sharing of information, to support the earliest collection of income. Liaise with social work and legal colleagues, and other relevant professionals regarding invoices for service users' contributions and deferred payment accounts.
8	Respond to service user enquiries in a timely, appropriate and supportive way. Produce clear information regarding accounts and adjustments.

Scope (outline the size or scope of the role, direct or indirect responsibility for people, finances, resources and any special aspects of the role)

Create and issue invoices to service users or their financial representatives, for contributions due in respect of adult social care services.

Verify data from charging system, reports from internal providers, variation returns and information from purchasing and procurement team, contracts, and other relevant sources, to ensure accuracy of invoices.

Robustly maintain charging data, and produce reports as required for managers.

Provide charging advice and information to relevant managers and as required.

Manage deferred payment agreement accounts in line with guidance, policy and procedure, applying relevant administration charges and interest, and issuing statements.

Manage recharges to recover funds from CHC due to the council.

Liaise with contracts team, purchasing and procurement team, and framework team to resolve data interfacing issues and enable robust sharing of critical information for charging and associated processes.

Respond to customer queries in a timely, accurate and supportive way. Ensure that relevant teams are aware of timescales and invoicing deadlines, and ensure they provide relevant information in a timely way to enable invoicing deadlines to be met.

Work Profile (outline the main areas of responsibility and accountability and competencies)

To provide a robust invoicing service for the council, by creating invoices for assessed contributions due from service users for residential and non-residential adult social care services, and for standard non means-tested charges.

To manage deferred payment accounts, issue statements and invoices in line with policy and guidance, liaising with the sundry debt team, solicitors and service users.

To ensure invoices are accurate and issued in line with timescales, and to respond appropriately, sensitively and in a timely way to invoicing queries from service users or their financial representatives.

To work closely with financial assessment colleagues, and proactively resolve queries relating to invoices for new, revised and backdated assessments.

To support service users and their financial representatives by providing clear and accurate information, and dealing with queries in a timely, clear and appropriate manner.

To maintain the integrity of the charging systems, and support system testing, changes, and upgrades.

To manage deferred payment accounts, and issue statements and invoices in line with policy and guidance, liaising with the sundry debt team, solicitors and service users. To request annual property valuations, and share with financial assessment colleagues for assessments to be reviewed. To liaise with

property services for valuations when these have not been provided by service user. To ensure updated information is used in charges.

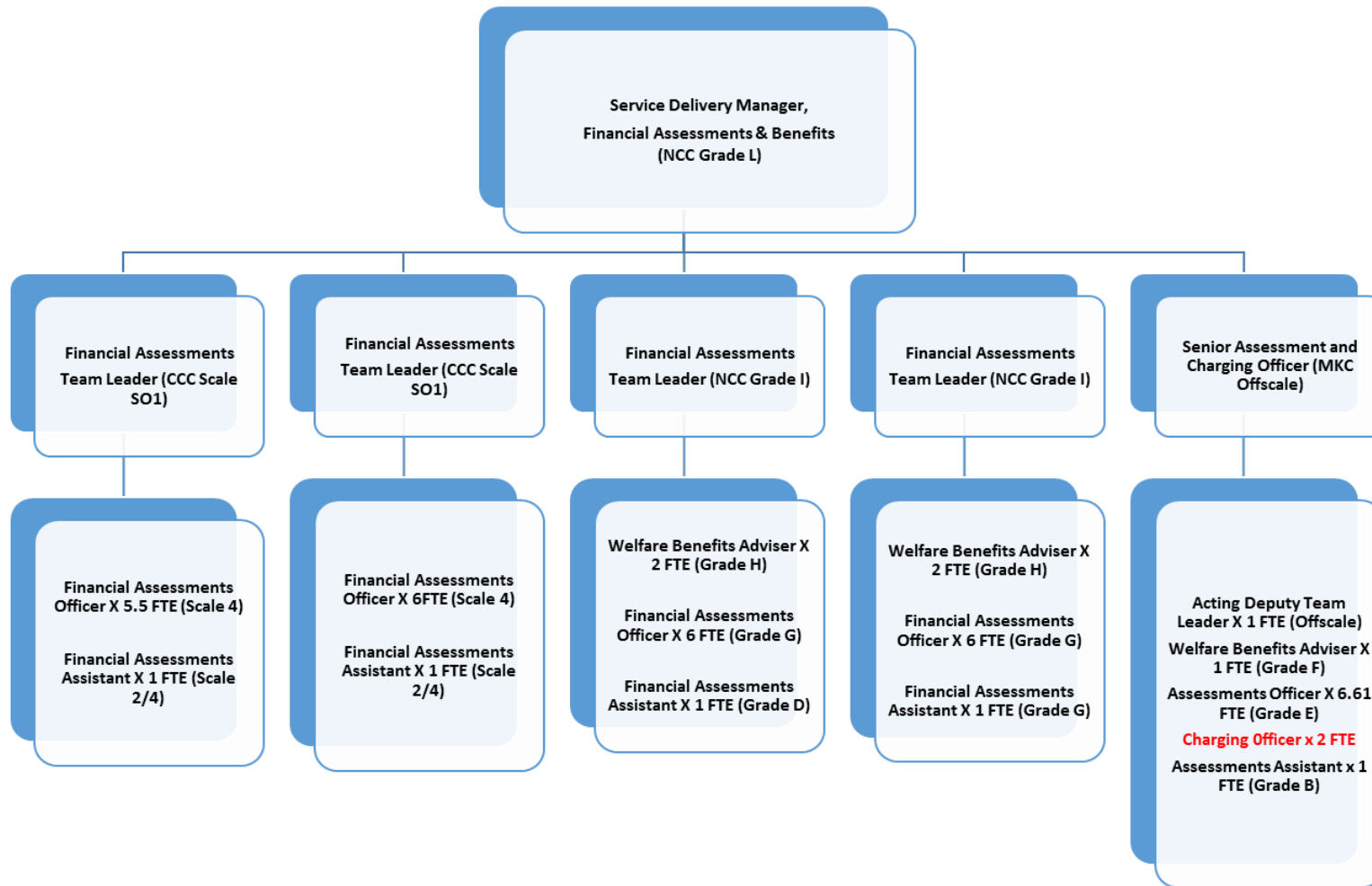
To robustly maintain invoicing data in systems and spreadsheets, and manage produce reports and statistical information for managers as required.

To work closely with the sundry debt team and support them with information regarding charges, invoices, details of property sales, deferred payments accounts, land registry charges and associated matters. To inform the sundry debt team of property sales, and of executors details for deceased service users. To liaise with financial assessment colleagues and legal colleagues regarding land charges, administration charges, and other aspects of deferred payments, to enable timely invoicing of these accounts.

To provide accurate advice to internal and external clients.

Proactively contribute to continual improvement of working practices, and support training of new or inexperienced staff on invoicing processes.

Job Context (attach the organisation chart(s) relating to the role)



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 fulfill the role requirements

Extensive knowledge and skills gained through practice and/ or qualification to fulfill 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 application form, interview, testing, reference
		Essential	Desirable	Awareness	Significant	Extensive	
SKILLS AND KNOWLEDGE Technical knowledge and qualifications	Educated to GCSE standard grade C or equivalent in Maths and English.	X			X		Application form, reference, exam certificates, interview
	Excellent customer care skills.	X			X		
	Experience in working in similar environment.	X			X		
	Proven customer service background with excellent customer care skills.	X			X		

	<p>Evidence of excellent communication skills both written and verbal.</p> <p>Good IT skills with good knowledge of Microsoft applications.</p> <p>Able to demonstrate excellent Microsoft excel skills.</p> <p>Excellent numeracy skills.</p> <p>Experience of bespoke invoicing systems</p> <p>Knowledge of local government finance, specifically adult social care finance</p>	X			X	X	Test
Planning and organising work	Experience of working independently scheduling and prioritizing own work to meet deadlines	X			X		Application form, interview
Planning capacity and resources	Ability to prioritize workload to meet strict invoicing deadlines	X			X		Application form, interview
Influencing and interpersonal skills	Ability to communicate clearly and effectively verbally and in writing with different groups, adapting communication style to meet customer needs.	X			X		Application form, interview
PROBLEM-SOLVING	Ability to resolve complex invoice related queries, with regard to policy and procedures, and in a customer focussed manner	X			X		Application form, interview
Using initiative to							

overcome problems	Ability to liaise with colleagues in other teams, departments and agencies, including internal and external care providers, in order to collate detailed information to resolve customer invoicing queries	X			X		Application form, interview
	Ability to read and interpret reports, analyse data, undertake reconciliations, and spot data errors. Ability to maintain accurate data in excel spreadsheets and systems to produce accurate reports and statistical data	X				X	
Managing risk	Ensure invoices are accurate, and produced in line with strict scheduled deadlines, and meet statutory direct debit requirements	X			X		Application form, interview
Managing change	Ability to cope with and adapt to changes in service and procedure	X			X		Application form, interview
ACCOUNTABILITY and RESPONSIBILITY Undertakes tasks without supervision	Ability to work with colleagues within own team and other teams and departments, in order to collate relevant information and take advice (including legal advice) communicate effectively on charges, adjustments, and deferred payment accounts. Ability to work independently on own invoicing schedules. Ability to ensure accuracy of data used in invoicing process, and to understand and complete	X			X		Application form, interview

	accuracy checks prior to raising batch invoices						
Managing people	Not applicable						
Managing financial resources	Not applicable						

COMPETENCIES REQUIRED – All post holders must be able to comply with the Council’s core competency requirements, Customer Focus, Communicating and Engaging, Managing Resources and Risk, Organising and Improving Performance, Taking Responsibility, Team Player, and Excellent Leadership

CORPORATE SAFEGUARDING STATEMENT – All post holders must be committed to applying and upholding the Council’s Corporate Safeguarding Policy Statement. Specific safeguarding responsibilities should be detailed in this document.

SPOKEN ENGLISH FLUENCY DUTY REQUIREMENT - The ability to converse at ease with members of the public and provide advice in accurate spoken English is essential for this post.

Other information e.g.

- able to travel to meet service delivery requirements
- available to undertake work outside of normal working hours

Signed Line Manager	Signed Service Director	
Print Line Manager	Print Service Director	Date