

Role Profile

Job Title:	Deputyship & Appointeeship Officer
Location:	Colindale / Hybrid
Directorate:	Communities, Adults & Health – Customer Finance
Grade:	Grade G
Number of Staff responsible for	0
Reports to:	Lead Practitioner – Customer Finance

1. Purpose of Job:

- To provide specialist advice and operational delivery of the Council's Deputyship and Appointeeship functions in accordance with the Mental Capacity Act 2005, Care Act 2014, Court of Protection requirements, and guidance from the Office of the Public Guardian.
- The postholder will manage referrals from social workers, coordinate applications, and oversee financial and property related responsibilities for adults for whom the Council holds legal authority to act as Deputy or Appointee.
- The role ensures high quality financial stewardship, accurate recordkeeping, statutory compliance, and effective partnership working across Adult Social Care and external agencies.

Key Accountabilities

A. Referrals & Case Coordination

- Manage new referrals for Appointeeship and Deputyship, including information gathering, eligibility checks, and submissions to the DWP or Court of Protection.
- With the support of the Lead Practitioner – Customer Finance, review all the applications to the Court of Protection on behalf of the Director Adults & Communities and ensure that they are authorised accordingly.
- Cases will be appropriately split across the three Deputyship & Appointeeship officers (alpha split based on client surnames).
- Maintain and update all referral information within the Client Money & Finance Management System (currently CASPAR).
- Monitor the integrity of the data and ensure accuracy and consistency across the range of systems and spreadsheets.

- Provide advice to and liaise with practitioners, next of kin, colleagues and care home staff on processes, alternatives, and statutory requirements under the Mental Capacity Act.

B. Deputyship & Appointeeship Case Management

- Act as the Council's appointed Deputy or Appointee, managing the financial affairs of individuals who lack capacity.
- Undertake client visits as required, at least annually, to fulfil statutory responsibilities and ensure welfare and financial needs are appropriately met.
- Represent clients' best interests in dealings with creditors, financial institutions, care providers, and family members.
- Ensure compliance with Court of Protection directions and all relevant legislation.

C. Financial Management

- Manage client income, expenditure, benefits, bank accounts and personal allowances, including applications for Universal Credit and all other relevant benefits.
- Reconcile client accounts, process payments on Bankline, set up direct debits and monitor transactions.
- Prepare and submit the Annual OPG Report, tax returns to HMRC and other statutory returns within required deadlines.
- Ensure all Practice Direction 19B fees and related charges are applied and recorded in line with guidance and internal procedures.
- Ensure that Barnet's Annual Appointeeship charge is made for all appointeeship clients with savings over £3,000.
- Maximise client income through proactive benefits liaison and corrective action where underpayments or entitlements are identified.
- Ensure that residents' excess funds are deposited into an interest-bearing account at the Court Funds Office.
- Identify and escalate any suspected fraud, financial irregularity or safeguarding concern.
- Carry out specific investigations and projects under Direction of the Court of Protection/ Adult Safeguarding Team.

D. Property & Estate Management

- For Deputyship clients, oversee the security, valuation, insurance and maintenance of properties owned by them, where the Courts have not appointed a Panel Deputy.

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- Work with the Community Resources (Property & Funeral) Officer to ensure compliance with Care Act Section 47 requirements. Attend properties and provide cover as required, e.g. due to annual leave.
- Work with the Community Resources (Property & Funeral) Officer to ensure that valuation, insurance, and searches are carried out for potential Deputyship client's properties and ensure that they are secured, maintained and insured under Barnet's Insurance Policy. Once appointed Deputy, to undertake an inventory, securing all items of value prior to arranging clearance and sale of property.
- Work with the Manager, Customer Financial Affairs (Residential) to coordinate inventories, clearance, sale of property via public auction and contents in accordance with Council procedures.
- Register the death of Deputyship Client and provide any necessary information to Community Resources (Property and Funeral) Officer to arrange funerals in accordance with their wishes and religious beliefs.
- Provide inventories and documentation to support estate administration.

E. Systems, Data & Performance

- Maintain accurate and timely financial and client data within CASPAR and associated systems.
- Contribute to data quality, audit requirements and financial governance standards.
- Provide management information, performance indicators and reporting to support service planning and performance monitoring.
- Support system changes as appropriate.

F. Partnership Working & Professional Advice

- Provide specialist guidance to Social Workers, Care Managers, residential providers, next of kin and other professionals.
- Build and maintain strong relationships with external agencies including the Court of Protection, DWP, Office of the Public Guardian, HMRC, banks and financial institutions.
- Work collaboratively with internal teams across Communities, Adults & Health and Customer Finance.

Financial Responsibilities

- Manage and monitor deputyship accounts, prepare regular activity management reports and apply the principles of sound financial practice necessary to operate within the relevant financial procedures.
- Maximise client's income and ensure correct benefit entitlements are claimed on a timely basis.
- Ensure that the client's accounts and financial affairs are managed effectively, efficiently and in line with the limits set down by the Court.

- Ensure customers are paid their personal allowances each month and contribution towards their care charges/utility bills and other expenses are made.
- To be responsible for completing the Annual OPG report and Tax Returns in respect of deputyship cases (and ensure that they are completed within specified deadlines).
- To be responsible for ensuring that the Deputyship accounts are maintained and reconciled.
- To prepare and process payments (via bank line) of invoices in respect of client's contribution and payment of personal allowance are paid in a timely manner.
- To prepare/ set-up direct debits and/or Standing Orders relating to regular payments needed, as soon as is practicable and monitor transactions to ensure that the payments are being processed correctly.
- On receipt of the Court Orders, ensure that all financial agencies are notified.
- Ensure that residents are charged relevant fees regarding deputyship services provided (Practice Direction 19B fees) in line with relevant guidelines and the fees are credited to the correct account.
- Review business processes to minimise the risk of fraud and alert the Team Manager in respect of any suspected incident.

4. Health and Safety Responsibilities:

As an employee of the London Borough of Barnet, you are required to:

- Abide by Barnet's health and safety policy and associated arrangements
- Complete mandatory health and safety training
- Follow safe systems of work and use devices/guards provided for safety.
- Wear/use personal protection equipment where issued and instructed to do so, including lone working devices.
- Report any Accident/Incidents/Hazards.
- Take care of your own and other's safety, health and wellbeing

5. Promotion of Corporate Values

To ensure that customer care is maintained to the agreed standards according to the council's values. To ensure that a high level of confidentiality is maintained in all aspects of work. Our values:

Our values: Caring / Learning to Improve / Inclusive / Collaboration

6. Flexibility

In order to deliver the service effectively, a degree of flexibility is needed, and the post-holder may be required to perform work not specifically referred to above. Such duties, however, will fall within the scope of the post, at the appropriate grade.

7. The Council's Commitment to Equality

To deliver the council's commitment to equality of opportunity in the provision of services. All staff are expected to promote equality in the workplace and in the services the council delivers.

PERSON SPECIFICATION

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Criteria	Essential/Desirable	Assessed by:
Qualification required		
Professional qualifications/memberships - HND/Diploma/NVQ and equivalent work experience	Essential	Application/Interview
Education - Good numeracy and literacy skills	Essential	Application/Interview
Technical / knowledge requirements		
IT Skills Good IT and data management skills, including proficiency in Microsoft Teams, Microsoft Word, Outlook and Excel spreadsheet packages Knowledge of financial systems and databases: essential Knowledge of key systems: Mosaic / Oracle / Caspar.	Essential Desirable	Application/Interview
Charging Framework Working knowledge of Care Act 2014 Framework for Social Care Charging, Barnet's Adult Social Care Charging policies Ability to understand and interpret complex guidelines and legislation. To understand these guidelines and regulations.	Desirable Essential Desirable	Application/Interview
Behavioural Competencies		

Personal Effectiveness		
<p>Communicating & Influencing</p> <ul style="list-style-type: none"> - Is courteous and polite when interacting with customers and colleagues. - Passes on information accurately and promptly. - Listens carefully to others and asks questions for clarification - Presents ideas and views with confidence and clarity. - Writes fluently and succinctly using appropriate style. - Adopts a clear and professional telephone manner. - Deals with confidential or sensitive issues discreetly. - Presents a positive and professional image of self and LB Barnet when communicating. - Is open and honest when communicating with others 	<p>Essential</p>	<p>Interview</p>
<p>Respecting others</p> <ul style="list-style-type: none"> - Respects the opinions of others and acknowledges opposing viewpoints. - Consistently acts in a way that promotes equality and diversity Shows integrity and fairness when dealing with customers and colleagues. - Acts on and achieves the promises and commitments made to customers and colleagues. - Respects others' time by being punctual. - Demonstrates impartiality and objectivity when taking actions and making decisions. 	<p>Essential</p>	<p>Interview</p>

<ul style="list-style-type: none"> - Shows empathy and understanding for the feelings of, and situations faced by others. - Is aware of own responsibilities for the health, safety and welfare of self and others 		
<p>Striving for Excellence</p> <ul style="list-style-type: none"> - Ability to manage competing priorities, maintain attention to detail, and meet strict deadlines. - Demonstrates a positive attitude and approach to work. - Is self-motivated, undertaking relevant tasks and activities without always having to be asked. - Copes effectively with work-related pressures and setbacks - Is flexible and adaptable to changing goals and circumstances - Acts quickly to deal with potential problems. - Ensures own work is of a high quality, accurate and timely. - Strives to improve on past standards of performance. - Manages time and prioritises work to maximise productivity and effectiveness. - Displays conscientiousness in getting the job done to the best of ability. 	<p>Essential</p>	<p>Application/Interview</p>
<p>Leadership</p>		
<p>Setting Direction</p> <ul style="list-style-type: none"> - Is clear about LB Barnet's strategic priorities and the goals of own service area/Directorate. - Understands how own work contributes to the LB Barnet's \ goals. 		

<ul style="list-style-type: none"> - Prioritises and plans own work based on an understanding of the 'bigger picture'. - Provides feedback on, and constructively challenges, the direction and working practices of the team, service area, or organisation. - Seeks to understand the need for, and responds proactively to organisational change. - Approaches change positively. 	Desirable	Application/Interview
<p>Managing performance</p> <ul style="list-style-type: none"> - Works with manager to agree performance objectives. - Takes ownership for and commits to achieving performance objectives. - Monitors and evaluates own performance against objectives. - Positively inputs to the performance appraisal and development review process. 	Essential	Application/Interview
<p>Developing talent</p> <ul style="list-style-type: none"> - Demonstrates a commitment to own personal development and learning. - Volunteers to take on new challenges and learn new skills. - Actively seeks and acts on feedback on own performance. - Helps to develop stretching but achievable objectives. - Provides praise and constructive feedback to others. - Gives help and coaching to less experienced colleagues. 	Essential	Application/Interview

<ul style="list-style-type: none"> - Learns from the skills and experience of others. 		
Working in partnership		
<p>Team working</p> <ul style="list-style-type: none"> - Shares information with colleagues to deliver objectives. - Contributes to a positive team spirit and healthy working environment. - Actively contributes ideas in team meetings or discussions. - Appreciates the demands on team colleagues and willingly provides them with support. - Can agree to compromise where appropriate 	Essential	Application/Interview
<p>Cross-Barnet working</p> <ul style="list-style-type: none"> - Understands the key functions of LB Barnet and the broad roles of service areas. - Recognises the advantages of working with others across the council. - Builds strong working relationships, and seeks out views of people outside of their team. Appreciates the political make-up and decision making processes of the council. - Shares information and knowledge with those outside of own team. 	Desirable	Application/Interview
<p>External Partnership Working</p> <ul style="list-style-type: none"> - Readily and effectively works with representatives of partner organisations. - Has a broad understanding of the wider local government context. - Recognises the importance to the council of active partnership. 	Essential	Application/Interview

Values & Behaviours		
Caring		
Integrity- I work with residents and colleagues in a way that builds trust.	Essential	Interview
Empathy- I take time to 'check in' to see if the people I work with are ok.	Essential	Interview
Support- I support my colleagues to deliver excellent services. I focus on resolving any issues and capturing lessons learnt	Essential	Interview
Learning to Improve		
Insight- I regularly rely on evidence and professional standards to support my work and decision making.	Essential	Interview
Agile- I am fully empowered to act within the scope of my role	Essential	Interview
Growth Mindset- I take responsibility for my own personal development, growth and learning and support others with their learning and development where I can	Essential	Application/Interview
Inclusive		
Personal Responsibility- I am curious about what is important to others around diversity. I reflect and act upon this curiosity to improve my own understanding	Essential	Interview
Engage with discomfort- I am open to and reflect on what makes me uncomfortable and use my engagement with others to challenge myself and constructively challenge others	Essential	Interview
Champion Diversity- I recognise the advantages and importance of equality, diversity and inclusion in delivering outcomes for residents, and take an active role to ensure they are implemented and integrated in everything I do.	Essential	Interview
Collaborative		
One Team- I actively and purposefully build my network of relationships with people across the Council and with partners. I proactively seek	Essential	Interview

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feedback and evidence as a way of learning from and improving the way I work with others		
Accountable- I accept responsibility for my own actions and decisions, and demonstrate commitment to ensuring these align to what is best for Barnet	Essential	Application/Interview
Outcomes Focused- I adapt my way of working to best suit the outcome we are trying to achieve within the scope of my role and professional standards	Essential	Application/Interview