

## Role Profile

<b>Job Title:</b>	<b>Direct Payments Advisor</b>
<b>Location:</b>	<b>Colindale/Hybrid</b>
<b>Department:</b>	<b>Customer Finance</b>
<b>Directorate:</b>	<b>Communities, Adult and Health</b>
<b>Grade:</b>	<b>G</b>
<b>Type of Working:</b>	<i>Office/Hybrid Working</i>
<b>Reports to:</b>	<b>Direct Payments Team Lead</b>

### Job Purpose:

The Direct Payments Advisor role supports the delivery of duties under the Care Act 2014 by enabling individuals to exercise choice and control over how their assessed care and support needs are met.

The role includes:

- To provide advice and support to individuals receiving a Direct Payment, including the set-up of Direct Payments and advising on the responsibilities involved in employing staff and promoting good employment practice.
- To financially monitor individuals' Direct Payment accounts, including identifying and recovering surpluses where appropriate.
- To develop, promote, and support the take-up and use of Direct Payments, enabling people to organise and manage their own support packages.
- To engage with social care teams to provide advice and support on the set-up and ongoing management of Direct Payments.
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### 1. Key accountabilities:

#### Advising Direct Payment Users

- To provide accurate and up-to-date advice to individuals who use a Direct Payment to support them to have choice and control over their care.
- To provide advice and support to service users and staff regarding financial administration of direct payments. In addition provide advice and support with all aspects of setting up and managing Direct Payment care packages, including advice on the responsibilities involved in employing staff and on good employment practice.

- Develop, promote and implement the take up and use of direct payments and to support and enable people to use direct payments to organise and manage their own support packages.
- To support the Direct Payment user with the set-up of their direct payment, whether on Pre-Paid Card or Payroll Account.
- Ensure the service user understands their responsibility in employing a carer. i.e. good employment practice, legal and practical requirements, salaries and health and safety obligations.
- To help develop and support forums to facilitate peer support for existing and potential users of Direct Payments and through these forums to promote and disseminate good practice regarding direct payments.
- Where suitable set up 'drop-in' sessions for Direct Payment users who need support and guidance in regard to direct payments.

## Monitoring of Direct Payments

- To use the Council's Pre-Paid Card system to monitor spend by individuals who receive direct payments, including identifying surpluses and misused funds. Direct Payment accounts should be assessed against the outcomes in the support plan and where not used appropriately to follow up with direct payment users or their nominated individual.
- Liaise with Direct Payment users to retrieve surpluses where funding is unused or misused, taking into account any outstanding commitments.
- Running and using reports from the Pre-Paid Card system to help identify surpluses and misused funds.
- To work with Managed Payroll companies to monitor the accounts of individuals who have a managed Direct Payment.
- To refer individuals for a social care review where identified that the individuals needs are not being met by their direct payment or funding is being consistently misused.

## Management of Uplifts

- Within parameters, carry out activity to manage the budgets of service users including to put in place uplifts where this is necessary

## Support to Social Care Teams

- To liaise with social care team and other appointed assessors in identifying potential users of direct payments and work with them to implement the payments and reassure them that direct payments is an option and not an obligation.
- To provide training to social care teams and where appropriate to service users in order to make effective user of direct payments.
- To attend social care team meetings in order to promote take up and develop a seamless service aimed at self-advocacy.

## Policy and Processes

- Maintain an in-depth knowledge of Direct Payment legislation, policies and related matters. Deliver high quality, accurate, responsive support, advice and information, to colleagues, across the service, relating to Direct Payments.
- All systems and processes must comply with the Council's financial framework and Best Practice and should reflect the demands of the Fairer Contributions Policy and the increasing number of people taking up self-directed support and direct payments.
- Support the Customer Finance Team Manager and Direct Payment Lead to update Direct Payment documentation and information on the Council's website to make sure information provided is up-to-date, accurate and easy to access.
- To work with the Customer Finance Team Manager and Direct Payment Lead to help resolve complex queries and issues and to investigate any complaints or concerns raised about the team.

## Risk Management

- To identify actual or potential risk situations and report these to the line manager, making recommendations for action as necessary.

## Data and Reporting

- Supporting the Customer Finance Team Manager and Direct Payments Lead to ensure regular and timely reporting on performance and referral data.

## Other responsibilities

- To attend and participate in meetings, reviews and working groups as directed by the line manager
- To record and keep safe adequate records of intervention and actions on behalf of service users in accordance with corporate policy
- To propose and present ideas on the development of Direct Payment service to the Direct Payment Lead and Team Manager.
- To use initiative to resolve issues with Direct Payment users within the scope of the role.
- The Council intends to implement Direct Payments legislation in such a way as to make direct payments accessible to people with a wide range of disabilities including people with physical disabilities / sensory impairments, learning disabilities, mental health and older people.

## 2. Financial Responsibilities: None

## 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:

**C**aring / **L**earning to Improve / **I**nclusive / **C**ollaboration

## 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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<b>Directorate:</b>	<b>Communities, Adults &amp; Health</b>
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<b>Reports to:</b>	<b>Direct Payments Lead</b>

<b>Criteria</b>	<b>Essential/Desirable</b>	<b>Assessed by:</b>
<b>Professional Membership/Qualification</b>		
Professional qualifications/memberships HND/Diploma/NVQ and or equivalent work experience	Essential	Application/Interview
Education: Good numeracy and literacy skills	Essential	Application/Interview
<b>Experience &amp; Knowledge</b>		
Ability to handle confidential and sensitive personal information securely and appropriately, ensuring compliance with GDPR and Caldicott principles.	Essential	Application/Interview
Extensive knowledge, experience and understanding of delivering high-quality and cost-effective services for service users.	Desirable	Application/Interview
Strong Knowledge of Direct Payments legislation, guidance, and best practice, including the Care Act 2014, with proven experience in administering and supporting Direct Payments in line with council policies and financial regulations.	Desirable	Application/Interview

Proven experience in delivering high-quality, customer-focused services to members of the public, handling enquiries professionally, efficiently, and with empathy while managing complex issues to achieve positive outcomes.	Essential	Application/Interview
Experience in providing accurate, clear, and timely advice to a wide range of stakeholders, including colleagues and external partners, using sound judgement to resolve enquiries and maintain high service standards.	Essential	Application/Interview
Experience of working in a local authority, social care, or financial setting, with a good understanding of multi-agency working. Able to work collaboratively with	Desirable	Application/Interview
colleagues and partner organisations to support service users and deliver effective services.		
<b>Skill &amp; Ability</b>		
<p><b>IT Skills</b></p> <p>Good IT and data management skills, including proficiency in Microsoft Teams, Word, Outlook, and Excel.</p> <p>Competent in the use of case management systems, with an understanding of how these support efficiency, effectiveness, and service safety.</p>	Essential	Application/Interview
<p><b>Communicating and influencing</b></p> <p>Ability to clearly communicate complex issues to service users, carers, and stakeholders.</p> <p>Ability to interpret and present Direct Payments legislation and technical guidance in a concise and accessible format.</p> <p>Excellent written and verbal communication skills, with the ability to communicate accurately and appropriately with members of the public, colleagues, partner agencies, and senior management.</p>	Essential	Application/Interview
<p><b>Problem solving</b></p> <p>Ability to analyse complex information quickly, reaching and articulating clear decisions, and delivering solutions that command support.</p>	Essential	Application/Interview

<p><b>Striving for Excellence</b></p> <p>Ability to effectively plan and prioritise workloads, managing competing demands while maintaining accuracy and attention to detail to meet deadlines.</p> <p>Ability to recognise potential issues and take timely, appropriate action to resolve them.</p> <p>Ability to work on own initiative, demonstrating selfmotivation and requiring minimal supervision.</p> <p>Ability to respond positively to change, adapting to shifting priorities and service needs.</p> <p>Ability to produce work of a consistently high standard, ensuring outputs are accurate, timely, and meet service requirements.</p> <p>Ability to review and improve own performance, demonstrating a commitment to continuous improvement.</p>	<p>Essential</p>	<p>Application/Interview</p>
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<p>Good organisational and time management skills, enabling efficient use of resources and effective delivery of tasks.</p>		
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**Values & Behaviours**

**Caring**

<p>Integrity- I work with candidates and colleagues in a way that builds trust.</p>	<p>Essential</p>	<p>Application/Interview</p>
<p>Empathy- I say “thank you” and “well done” where appropriate, and take time to ‘check in’ to see if the people I work with are ok</p>	<p>Essential</p>	<p>Application/Interview</p>
<p>Support- I support my colleagues to deliver excellent services. I focus on resolving any issues and capturing lessons learnt</p>	<p>Essential</p>	<p>Application/Interview</p>

**Learning to Improve**

<p>Insight- I regularly rely on evidence and professional standards to support my work and decision making.</p>	<p>Essential</p>	<p>Application/Interview</p>
<p>Agile-I am fully empowered to act within the scope of my role</p>	<p>Essential</p>	<p>Application/Interview</p>

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
<b>Inclusive</b>		
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	Application/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	Application/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	Application/Interview
<b>Collaborative</b>		
One Team- I actively and purposefully build my network of relationships with people across the Council and with partners. I proactively seek feedback and evidence as a way of learning from and improving the way I work with others	Essential	Application/Interview
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