



Job Description

This job description has been designed to indicate the general nature and level of work required of the post to indicate the level of responsibility. It is not a comprehensive or exhaustive list, and the line manager may vary duties from time to time which do not change the general character of the job, or the level of responsibility entailed.

Post Details	
Job Title	Senior Direct Payment Officer
Service	Adult Social Care
Team	Financial Assessment and Payments Team
Location	Shute End
Reports to	Senior Financial Assessment and Payments Officer
Worker Style	Hybrid - Remote working with attendance at Council offices as and when required
Responsible for	3
Grade	Grade 6
Contract Type	Permanent full time

Main Accountabilities	
1.	- Assist with daily management of the Direct Payment Team, assessing training needs. Deputise in the absence of the Team Manager; - Compilation of management statistical records as and when required; - Discuss outcomes of accuracy checks with team members, reporting back to Team Manager; - Give advice and guidance to team members around complex decision making, referring to Team Manager where appropriate. - Respond to complaints from customers in connection with Direct Payments
2.	- Conduct timely reviews of Direct Payments according to Council Policy, resolving any queries; - Give advice and guidance to internal and external customers and their representatives in respect of Direct Payments; - Set up and process Direct Payments utilising software packages available; - Reclaim Direct Payment funds not used or misspent, in accordance with Council procedure; - Where appropriate, attend pre-arranged visits to customers to facilitate the set-up of Direct Payments in a timely and accurate manner;





	• Maintain sufficient records so that all appropriate monitoring and statistical records covering the function can be compiled on a monthly, quarterly, and annual basis. Ensure all relevant procedures are maintained. • Encourage customers to sign a Direct Debit Mandate to support slicker processes and WBC debt.
3.	• To support the continuous improvement of processes and procedures within the service using best practice from others where appropriate. • Organise local events to support DP customers, carers and 3rd parties • Produce newsletters, information letters and leaflets. • To prove willingness to proactively identify service improvements, making recommendations to improve overall service delivery and customer service or working practices with knowledge of legislative requirements, quality assurance objectives and good practice. This may include contributing to development of IT systems to support improvements. • Promote and champion Direct Payments through events and liaison with internal customers and external agencies; • Keep up to date with current legislation and government changes, specifically in connection with the Care Act 2014 and the Mental Capacity Act 2005.

Person Specification	Essential	Desirable
Education/Qualifications	• Good level of general education to a minimum of GCSE standard or above in Maths and English	
Experience	• Previous experience in a finance environment. • Previous experience of face-to-face interactions with customers. • Experience of working under pressure in a busy office environment and to tight deadlines. • Experience of a supervisory role with the ability to motivate staff	• Experience of working with vulnerable customers.
Skills/Knowledge	• Excellent customer care skills, with the ability to communicate at all levels • Effective written & verbal communications skills • Ability to work under pressure and use own initiative to organise and prioritise own work loads • To be compassionate, empathetic and understanding	• General understanding of Equality, Freedom of Information and Data Protection legislation. • General understanding of the Care Act 2014 and Mental capacity Act 2005.





	• To be PC literate with organisational and numeracy skills • Good knowledge of Microsoft Office including Excel and Outlook • Good knowledge of, or ability to grasp and apply swiftly and effectively, the Council's Direct Payments functions and processes • General understanding of Adult Social Care Services and functions including Personal Budgets.	
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Purpose Details	
Service Purpose	Conduct financial assessments in respect of social care services customers to decide if a financial contribution is required, whilst maximising income for the Council and the Customer. To undertake the Council's Direct Payment offering, ensuring agreements are signed, customers paid in the most appropriate way and funds are correctly spent and monitored. Raising of Purchase Orders, paying provider invoices and invoicing of charges.
Role Purpose	Part of the Financial Assessments & Payments Team within Adult Social Care responsible for promoting, champion and improve Direct Payments delivery, provide general advice on Direct Payments delivery to customers, other Council Departments and partner organisations, individually, through group presentations and visits to customers, set up, process and review Direct Payments and provide relevant advice to both internal and external providers/customers in line with the Council's policy and the Care Act 2014.
Corporate Parenting	N/A

Supervision and Relationships	
Supervision Received	Reports to Senior Financial Assessments & Payments Officer for supervision, performance, general guidance, objective setting and feedback
Supervision Given	Overview of team Deputising for Senior Payments Officer
Contacts	Pre Paid Card providers (PFS/EML & allpay), ASC Teams, other WBC colleagues, care providers, customers and 3 rd party. The 3 rd sector.





Resources/Budget Management

N/A

Special Requirements

Full time Monday - Friday
Enhanced DBS required
Driving licence

Occupational Health Risk Assessment	Details
Skin/Respiratory Sensitisers	N
Working at Height	N
Exposure to Noise (>80-85dB)	N
Confined Spaces	N
Frequent Display Screen Equipment Use	Y
Driving for Work	Y
Hand Arm Vibration	N
Lone Working	Y
Healthcare/Social Contact with Patients	N
Blood Borne Viruses Exposure	N
Food Handling	N
Working with Animals	N
Specialised Medical Screening	N





Night Working	N
Safety Critical Work	N

Nature of the Role	Details
Healthcare or Hospital Work	N
Working with Children (under 18)	N
Working with Elderly/Vulnerable Adults	Y
Work Environment Details	Shute End/Home

Role Involvement	Details
Working with Children	N
Working with Vulnerable Adults	Y
Both of the Above	Y
Providing Care/Supervision for Children	N
Providing Care/Supervision for Vulnerable Adults	N
Both of the Above	N
None of the Above	Y

Disclosure and Barring Service (DBS)		Details
DBS Requirement	Enhanced DBS	
Eligibility Tool	Find out which DBS check is right for your employee - GOV.UK (Find out which DBS check is right for your employee - GOV.UK)	

Re-checks
<Details of required regular checks in line with regulations.>





WOKINGHAM
BOROUGH COUNCIL

Evaluation Declaration

Date of Evaluation:	21/07/2026
Evaluated by:	Lynn Smith, Financial Assessment and Payments Manager

