

Job Description

Job title	Client Finance and Welfare Advisor
Project/team	Finance Department
Main place of work	Clouds House East Knoyle Salisbury Wiltshire
Report to	Finance Director
Date This is the date the job description was written	30 January 2019
Key contacts Internal and external	Clients, Clients' families, Admissions, Treatment team, Medical team, Finance, Care Managers, Key workers, DWP, County Courts, Local Authorities.
Main purpose of the role In one or two sentences summarise why this role exists	To activate and administer benefit claims for clients in residential treatment, in accordance with funding agreements and individual contracts. To support clients with their personal finances and debt management during their stay at Clouds House in order to provide a holistic treatment episode.
Key accountabilities Financial, decision-making, key targets	Clouds House and client finances. Assessing information and making balanced decisions.
Main duties	<p>To obtain daily patient information from Admissions in order to collect funding agreements, deposits and payments.</p> <p>Open and close client ledger accounts.</p> <p>Notify DWP and complete relevant documentation, with clients, to open or perpetuate benefit claims.</p> <p>To provide a debt management service, assisting clients to make arrangements and deferments for payment to debtors. Provide an income and expenditure report and contact bailiffs, courts and other external organisations regarding outstanding debts. Provide a debt information pack at the end of treatment.</p> <p>To provide support and advice regarding Housing and Council Tax benefit and liaise with councils to manage arrears and perpetuate claims.</p> <p>To provide a daily internal banking service for clients to access personal cash, entering transactions concurrently to relevant ledger. To be reconciled weekly.</p> <p>Maintain dialogue with medical and treatment teams as to items of personal expenditure and provide a final statement if requested.</p> <p>Arrange for medical certificates to be issued and obtain relevant medical information for benefit claims.</p> <p>Liaise with treatment and medical teams regarding dental and prescription charges and collect cost where applicable.</p> <p>Credit control of outstanding invoices and amounts.</p> <p>Attend daily treatment team meeting in order to discuss individual clients and liaise with multi disciplinary teams regarding any issues arising thereof.</p> <p>Facilitate supervised use of phone and internet to clients, at the request of the treatment team.</p>

	<p>To update client database with relevant benefit information. Where required, liaise with secondary providers and arrange onward transport from Clouds House. Reconcile transport invoices to our records and forward to Finance Department for payment.</p> <p>To reconcile laundry and telephone monies.</p> <p>To perform such duties as assigned by the Chief Executive or Finance Director and all such other duties and activities, which may be required from time to time, without prejudice to salary.</p> <p>Provide holiday, sickness cover and assistance if required to Finance Team.</p> <p>To provide cover for Clouds House reception as required.</p>
<p>General duties Common to all roles</p>	<p>Comply with codes of practice, policies and procedures; Act to reduce health and safety risks; Work in harmony with the Charity's values; Respect others and value diversity; Continuously develop knowledge, learning, skill and practice; Continuously improve service delivery; Perform other reasonable duties as may be required from time to time.</p>
<p>Special conditions For example, unusual hours, travel</p>	<p>Ideally the role would start at 7.00am. This allows the role holder to understand the client needs over the last 24 hours prior to the morning meeting at Clouds House.</p>