Charging & Payments Team - Charging & Payments Assistant

JOB PROFILE

Section 1: Post Descriptor

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SECTION 1: POST DESCRIPTOR

1. JOB DETAILS	
Job Title: Charging & Payments Assistant	
Service Area: Strategy, Planning & Health Improvement	**Section:** Contracts, Commissioning & Quality Assurance
Reports to: Charging & Payments Officer	**Grade:** 3
Position Number: SW2345	**Gauge Reference:** A7784

2. JOB PURPOSE

To provide high-quality administrative support to the Charging & Payments Team (C&P Team), supporting residential and non-residential Health and Social Care Partnership (HSCP) services. The postholder will be responsible for completing financial transactional processes across HSCP Services. The post holder will work in a technical and fast paced environment and will be able to adjust to regular legislative and governmental changes relating to charges and payments for residential and non-residential HSCP services.

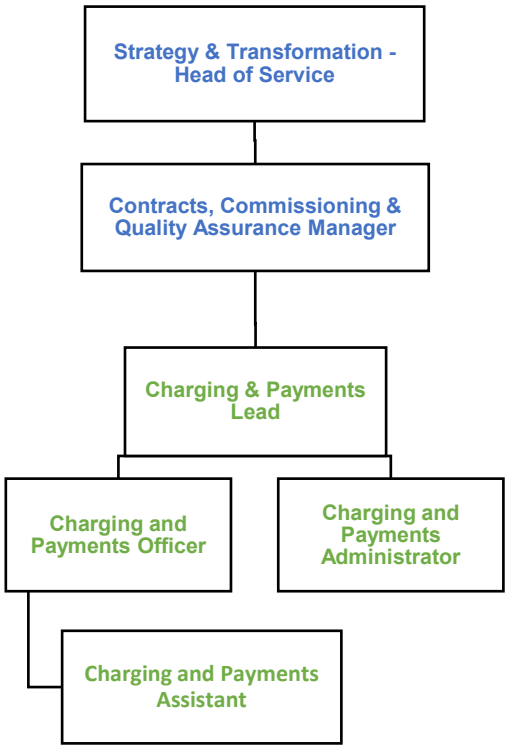
3. DIMENSIONS and SCOPE OF JOB (including budgetary and staffing responsibilities)

Budget: The post holder does not hold budgetary responsibility; however, they will be responsible for inputting provider payments and invoices on a regular basis and undertaking difficult financial calculations relating to the charging of residential and non-residential HSCP services, where individuals are assessed and maybe required to make a financial contribution to their care.

Staffing Direct: There will be no direct staffing responsibility.

Staffing Indirect: The post holder will be required to assist in training and cross-skilling other members of the team.

4. ORGANISATIONAL CHART
(shows levels directly above and below this post and includes grades of posts)



5. ROLE OF DEPARTMENT/SECTION

West Dunbartonshire Health & Social Care Partnership (HSCP) covers the full range of community health and HSCP services, with devolved responsibility from West Dunbartonshire Council and NHS Greater Glasgow and Clyde as a separate legal entity.

The HSCP is comprised of; children and adult health and HSCP services, specialist adult and children's services, fostering and adoption services, public protection, commissioned HSCP services, health improvement and inequalities services, advice services, criminal justice, homelessness, and a wide range of support services.

The Charging & Payments Team is a key support function that will align all payments and charging processes for residential and non-residential HSCP services ensuring the correct governance and protocols are in place. This team will also be central to the application of Self-Directed Support (SDS) charging, payment, and contracting processes.

The Charging & Payments Team will respond to the needs of operational services and other key teams, such as HSCP Finance by providing quality data and insights to inform financial monitoring and budgetary compliance, service volume (including unmet need) and SDS option data.

6. KEY ACTIVITIES, RESPONSIBILITIES and OUTCOMES

Reporting into the Charging & Payments Officer, this role will cover the following key activities, responsibilities and outcomes relating to both residential and non-residential HSCP services:

- Please note that any references to systems such as CareFirst and/or Comino (EDM) shall include the following statement “or such other system that the HSCP may migrate to”.

Systems:

- Monitor CareFirst clipboards for authorised work to be undertaken.
- Update CareFirst and Comino, inputting data to produce documentation for residential and non-residential HSCP services.
- Save documents into Comino that relate to the service users’ fees, charges and contract(s).
- Monitor CareFirst clip board daily to ensure accuracy and carry out the appropriate actions.
- Monitor Comino work trays (own and team/group) to ensure workflows are completed and are submitted for authorisation at the appropriate level and within timescale.
- Create and amend service packages and financial screens in relation to charges on CareFirst.
- Access CIS DWP System to confirm service users benefit and occupational pension etc
- To use various ICT systems and databases, including, but not restricted to, CareFirst, Comino, Agresso, and some bespoke systems. This includes input into system development and improvement using automation.

Administrative Support:

- Provide administrative support to the various Area Resource Groups (ARG) which are in place across the HSCP, such as minute taking, issuing documentation pre and post meeting, and circulating forward planner.
- Provide general administrative support to the C&P Team as required.
- Support information requests and maintain up to date information relating to delayed discharge by liaising with third party providers daily to ascertain the number of vacant beds within care homes to ensure this matches with the TURAS safety huddle.
- Maintain and update waiting lists for residential & Nursing Care
- Monitor team mailbox and respond to emails relating to the work of the team.
- Escalate work based on complexity to senior personnel within the team.
- Be responsible for administrative tasks within the Financial Assessment process that may be delegated to them. This may include communicating with service users, parents/carers and/or those with legal powers to act on the service users’ behalf to complete financial assessments, either in person in the office, care home or over the phone.

Contract Support

- Production and issuing of Individual Service Agreements (ISA) (for non-residential HSCP services) and Individual Placement Agreements (IPA) (for residential HSCP services) to third party providers.
- Production and issuing of contracts for residential and non-residential HSCP services to those with legal authority and capacity to sign.

Charging & Payments Calculation and Processing:

Scrutinise service users' financial information and bank statements which relate to residential and non-residential HSCP services, raising queries and escalating concerns where appropriate.

- Download remittance advice at agreed frequencies for residential and non-residential payment purposes.
- Update and maintain financial and statistical records across residential and non-residential care services using the sections preferred method of data capture.
- Undertake difficult financial calculations for residential and nursing, and non-residential care package charging purposes – using the Charging for Residential Accommodation Guidance (CRAG) rules, National Assistance Act and the Council's own Charging Policy for Non-Residential Care Services amongst other legislation, regulations and Council process as may be required.
- Undertake complex capital depletion calculations in line with an established governance framework.
- Support the annual financial re-assessment of all residential and non-residential care placements for client charging purposes (including populating letters and re-assessment and the subsequent issuing of these documents to all service users, this will also include all follow ups where appropriate).
- Highlight to Charging & Payments Officer and Team Lead any (potential) adult support and protection cases that may relate to financial harm.
- Issue invoices using Agresso debtors' system for both residential and non-residential client charges relating to their care in relation to client charges.
- Investigate and resolve problems/queries regarding provider payments and client charges for both residential and non-residential HSCP services.
- Undertake access to fund calculations.

Audit and Governance:

- Carry out financial audits on all service users to ensure all payments and charges are correct and are in line with set governance frameworks.
- Request, review and audit payment information relating to providers aged debt claims and creditor payments for both residential and non-residential care packages.
- Support and participate in regular audits of Care First for compliance purposes.

Learning & Development:

- Training team members (and other HSCP staff as may be appropriate) on key tasks and functions of the role.
- Support the Charging & Payments Lead, Officer and Administrators in a positive and collaborative manner with changes to processes and procedures that impact the Charging & Payments Team.
- Undertake training in accordance with job and/or team requirements.

Additional:

- Meet with service users and/or families who may be vulnerable, grieving, and anxious about financial charges
- Carry out property searches via Scotlist for property ownership validation.

- Access DWP system to ensure up to date benefits are in payment and that benefit information has been applied that relates to charging for residential and non-residential HSCP services. This also extends to highlighting any issues or challenges relating to a service users benefit to Line Manager.
- Providing support in relation to complaints and Freedom of Information requests.

7. PROBLEM SOLVING

The post-holder will be expected to use initiative to solve problems within their scope of role.

The post holder is required to respond to problems of varying degrees of complexity depending on the nature of work being carried out and commensurate with their Grade. Any unanticipated problems should be raised with the Charging & Payments Officer or Team Lead who will then advise how to proceed.

A framework of delegation exists to solve more challenging problems that may arise.

8. PLANNING

The post-holder will contribute to the work undertaken by Charging & Payments Officer and Team Lead which relates to the development, strategy and planning for future implementation. For example, to understand the need for change in relation to an evolving regulatory, legislative, financial and digital environment.

The post-holder must be able to plan and prioritise their workload to meet timescales.

The post holder is responsible for management of their own workload, working to deadlines which may at times be conflicting. Objectives will be set by the Charging & Payments Officer and the Charging & Payments Team Lead.

9. ASSIGNMENT AND REVIEW OF WORK

The post holder will report to the Charging & Payments Officer who will provide support and supervision.

The section's annual objectives are agreed through a HSCP Strategic Plan and within each service area there is a broad framework of delegated authority to develop and progress initiatives.

The post holder will have agreed targets, objectives and actions as part of the iMatter development process. The post holder is responsible for ensuring delivery of these objectives and manages the ongoing prioritisation of work within their own area of responsibility.

10. COMMUNICATIONS AND WORKING RELATIONSHIPS

The post-holder will be expected to communicate at all levels across the HSCP and parent organisations (Council and NHS), other partner agencies and the public.

Internal

- Lead Officer
- Line Manager
- Integrated Operational Manager
- Service Manager and Social Work colleagues
- Wider HSCP colleagues
- Independent Providers
- Colleagues across West Dunbartonshire Council
- Business Support staff.

External

- Service users and unpaid carers (including families of those receiving care and those who are vulnerable or grieving
- Commissioned provider organisations (private/independent sector and 3rd sector organisations)
- Other NHS and Local Authority colleagues
- Guardian/Power of Attorney
- External solicitors.

11. DECISION MAKING

The post holder has delegated authority to make decisions relevant to their role and grade in line within a framework of HSCP Policy.

12. MOST CHALLENGING PART OF THE JOB

Ability to understand and resolve (alone and with others) arrange of challenging issues that arise from providing administrative support to financial transactions (both charging and payments). Ability to manage and deliver on a range of complex, demanding, sensitive and often competing tasks and priorities. This requires the individual to be able to plan, monitor, evaluate and manage their own workload.

Being able to understand both residential and non-residential charging and payment regulations.

There is an expectation that the post holder will help on a wide and broad range of issues in relation to section.

13. GENERAL

Disclosure/PVG membership: Level 1 Disclosure

Politically Restricted Post: No

In line with the Rehabilitation of Offenders Act 1974 (Exclusions and Exceptions) (Scotland) Order 2003, the Authority/NHS requires you to declare all convictions defined as 'unspent' in terms of the Act as the post is classified as an 'excepted post'.

The duties and responsibilities contained within this Post Descriptor are neither exclusive nor exhaustive as the post holder may be required to undertake other reasonably determined duties commensurate with the level and grade of the post without changing the general character and nature of the post.

The Post Descriptor may be subject to revision, depending on the future needs of the post and the organisation, following appropriate consultation.

Although we offer flexible working, this role requires you to be office based during all training which can take some time to become familiar with each new process.

14. WDC TRAINING

West Dunbartonshire Council – Operates Skills Passports for all employees, which details the training available and timescales for undertaking courses. Skills passports are available via the Council's Intranet Organisational Development & Change

- Skills Passport A – New Entrant Employee Passport

Includes WDC Induction; Equality & Diversity; Data Protection (GDPR) & Security Awareness and relevant i-learn modules;
Policy Reading: Code Of Conduct; ICT Information Security Policy and Acceptable Use Policy

- Skills Passport B – WDC Employee Passport

Includes relevant i-learn modules

15. ROLE SPECIFIC TRAINING

Listed below are the training requirements which must be completed to undertake this position, with timescales where appropriate. Noting this is in addition to generic WDC training listed above.

Mandatory training required:

- CareFirst

Essential In-house training:

- Handling difficult customers
- Comino / Civica – Electronic Document Management System
- Agresso

This is not an exhaustive list, and additional training will be added when required.

Post Descriptor Prepared by: Sharon Bell - Date: 11/11/2026

SECTION 2: PERSON DESCRIPTOR

Essential	Desirable
Qualifications/Professional Membership	
English and Maths/Arithmetic (Standard Grade/National 4/5) – or equivalent qualification or experience of working in a complex environment.	Driver's license HNC (Administration) ECDL (or equivalent)
Training	
Willing to engage in personal development and embrace opportunities for training.	
Experience	
Relevant working knowledge of a high volume, finance team environment	Knowledge of HSCP services.
Good Communication Skills	Basic knowledge of financial systems and processes.
Good Numerical Skills	Knowledge of bespoke database systems
High level of self-motivation. Proactive, flexible, responsive and keen to embrace change.	
IT literate with the ability to ensure accurate data reporting (including statistical enquiries), obtain and collate information as required.	
Working knowledge of Microsoft packages. For example, Outlook, word, access, excel, power point, and MS Teams	
Ability to balance conflicting priorities and meet deadlines.	
Knowledge and Skill	
Good interpersonal and communication skills (both written and verbal)	
Effective organisation and time management skills	
Minute taking at complex and challenging meetings.	

Disposition	
Excellent telephone techniques with the use of a calm and pleasant manner	
Work with integrity and can maintain effective working relationships	
Ability to maintain confidentiality	
Have a sensitive and caring attitude to clients and carers	
Client centred approach	
Ability to demonstrate positive attitude and flexible approach to work, be motivated, inspire others.	
Understand the need for change and are open to this across your working life.	