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|  | JOB DESCRIPTION | FormJD1 |
| JOB TITLE: Revenues and Benefits Technical Officer | **POST NUMBER:**  1052CEY |
| **REPORTS TO** (Job Title): | Senior Technical Officer |
| **DEPARTMENT:** CCS | GRADE: 7 |
| **JE REF:** | 4003B01272 | PANEL DATE: | 15/05/2018 |
| **1.** | **MAIN PURPOSE OF JOB** To support the Senior Technical Officer and Revenues and Benefits Subsidy Manager in providing technical support, knowledge and advice to the Revenues and Benefits Service to comply with legislation and all statutory and non statutory returns, daily/annual billing and housing benefit subsidy to maximise income and subsidy collection. Deputise for the Senior Technical officer and represent the service at internal and external meetings as required. Represent the authority in respect of appeals and complaints. This includes attending court when necessary.To support, maintain and develop all new and existing IT systems and processes in respect of Exchequer services. This includes complex system administration, dealing with large values/ volumes of incoming and outgoing financial transactions and reconciliation. Assist with the to-day administration of the Revenues and Benefits teams, providing day to day quality assurance and dealing with technical and complex queries and applications of a discretionary nature. Supporting the provision of an efficient and effective Housing Benefit and Council Tax/NDR service by ensuring transactions are accurately and promptly processed, with exception reporting to ensure accuracy of processing that directly affect the subsidies/grants from central government. Provide information and assurance on these matters to internal and external audit with the support of the Management Team to ensure ongoing compliance. |
| **2.** | **CORE RESPONSIBILITIES, TASKS & DUTIES:** |
|  | 1 | Assessment of appeals and discretionary applications across the revenues and benefits services. Including Discretionary housing/CTR payments, section 13a CTAX awards and NDR DRR scheme issues. |
|  | 2 | Responsible for ensuring adequate submission, representation and presentation of appeal cases at the Appeals, and tribunal services (CTAX and NDR). Preparation for and attendance of Magistrates court for revenues recovery matters. |
|  | 3 | Assistance with and processing of technical and complex service assessments that require an expert knowledge of the legislation and calculations.  |
|  | 4 | To deal with complaints and explanations, disputed decisions, stakeholder claims and overpayment queries.Support the investigation and provide responses to MP and Local Government Ombudsman enquiries and stakeholder enquiries. |
|  | 5 | Undertake daily quality assurance checking across the services. This is important to ensure we give the best customer service and also feeds into the higher level financial returns, ensuring the LA maximises subsidy and Income at account/claim level |
|  | 6 | Compile responses to internal and external audit enquiries relating to complex queries on calculations and evidence requested. |
|  | 7 | Daily downloads from central government secure websites. Ensure all security, data protection and confidentiality policies are correctly applied and that all staff abide by the confidentiality rules that surround the use of the CIS enquiry system and DWP information on claimants. |
|  | 8 | To identify and authorise refund payments to customers plus any associated interest and tax, To ensure that all accountancy records and tax certificates are produced and maintained for audit purposes. Ensure prompt processing of all property valuations changes, refunds, interest and tax payments.  |
|  | 9 | Systems Reporting and Monitoring. To compile and run IT system queries using Business Objects and other software to support performance monitoring, financial reconciliation and quality checking for the revenues and benefits service areas e.g exemptions and reliefs/suspended claims. Ensure that all operational and exception reports including diary work and workload management are actioned appropriately. |
|  | 10 | Ongoing systems maintenance of all databases that are used to manage the service caseload. This will include parameter maintenance, integration with other systems and responding to requests for changes to the database configuration. When new releases or changes are made systems testing will need to be undertaken and faults logged with the software supplier as appropriate. |
|  | 11 | Periodic setup and checking of the database to schedule the recovery and payment processes at the appropriate times. This is key for council revenue and involves understanding the recovery/payment cycle and following through the process from start to finish. Practical operation of the recovery cycle processes, scheduling reminders, summonses and daily billing extracts. Ensure all correspondence is produced on time and in accordance with regulations. Bailiff workload management and progression, assuring the most appropriate action is taken. |
|  | 12 | Regular verification and authorisation of large volumes and amounts of direct debit payments relating to CTAX and NDR. |
|  | 13 | Daily payment processes and reconciliation. To undertake daily tasks relating to the payment,security and control of Housing Benefit cheque and bank transfer payments and associated reconcilation and exception reporting. To liaise with IT and Business Support regarding the printing and despatch of cheques and transmision of data files. Daily link between internal departments, IT, Accountancy, business support etc. |
|  | 14 | Annual systems Administration – to support the Senior Technical Officer with all year end processes. Preparing the systems for the new financial year, including annual billing, uprating, housekeeping and year end processes and procedures |
|  | 15 | Supporting the Senior Technical Officer with relevant information for all returns including statutory returns for revenues and benefits. Deputise and share knowledge to provide resilience in this process. |
|  | 16 | To be key in the change management process across the service by keeping up to date with complex legislation, technology and procedures. To design, deliver, implement and evaluate all aspects of training in relation to revenues and benefits legislation, statutory provisions and guidance. Methods will include 121 and group training, communicating any changes or new requirements amongst revenues and benefit teams efficiently. |
|  | 17 | To support the Senior Technical officer in ensuring a culture of consistent performance management across the team by reporting, analysing and summarising data and trends. Use management information to identify and propose improvements within the service. Identify opportunities for service improvement more effective use of existing and new IT technology. |
|  | 18 | Involvement in ad-hoc projects as and when the need arises. Deputise for the Senior Technical Officer and feedback information and actions required to the teams.  |
|  | 19 | Comply with health and safety policy and procedure, including security requirements of the service area. |
|  | 20 | Assist Managers with the distribution of workloads, and if necessary process Benefit Assessor and/ or Income Officer work during demanding periods to meet efficiency needs. |
|  | 21 | Download and process VEP/HBMS referrals and fraud cases from DWP and veritau in a timely manner and in accordance with security procedures. Ensure all CTAX and NDR lists are up to date from the VOA.  |
|  | 22 | Provide technical assistance and systems admin for the HB debtors team to ensure maximisation of recovery from customers. Monitor and manage the outstanding debts and overpayments and write off where appropriate.  |
|  | 23 | Regular liason with external agencies such as the DWP, VOA, registered social landlords and suppliers. Often dealing with matters of sensitive and confidential nature which can have significant impacts on customer’s wellbeing. |
| **3.** | **SUPERVISION / MANAGEMENT OF PEOPLE**Number of staff reporting to jobholder and nature of supervision eg full line management responsibility or day to day supervision of work **Direct**: 0 **Indirect**: 0 Deputise for the Senior Revenues and Benefits Technical Officer when required. |
| **4.** | **CREATIVITY & INNOVATION*** Ability to adapt and evaluate discretionary assessments for customers with complex circumstances. Provide unbiased and fair recommendations which can have a significant impact on vulnerable customer’s lives.
* Demonstrate a creative approach to resolve problems in dealing with cases relating to income collection, interventions, appeals, disputed decisions, stakeholder claims and overpayment issues.
* Look for and make suggestions relating to improvements in economy, efficiency, and effectiveness and of quality of service.
* The post requires research and listening skills and the ability to deliver complex information in an accessible format.
* Design and deliver training to an appropriate level to support and enhance the efficiency and accuracy of the team.
* Seeking to identify and maximise the use of new software and procedures to improve service delivery.
* Understand and problem solve technical systems and financial issues relating to complex financial calculations that staff are unable to resolve.
* Demonstrate creativity in designing exception reporting using database interrogation tools.
* Ability to constantly learn, adapt to and implement new service requirements. Interpret and apply complex legislation to practical situations on a daily basis.
* Undertake investigations across a range of systems platforms and departments both internal and external, to problem solve why a process is not working. For example internal databases, transmission software, BACS services and external banking organisations.
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| **5.** | **CONTACTS & RELATIONSHIPS****Internal*** Close working relationship with all staff and service managers across Revenues and Benefits.
* The post holder will develop effective relationships within the wider remit of Customer, Resident and Exchequer Services, Team Managers, and Trainers, e.g. Work Force Development unit.
* The post holder will also be required to be in daily contact with front and back office services e.g. colleagues in Revenues, Housing Dept. in relation to tenancy, rent liability, overpayments and arrears, homelessness.
* Daily contact with IT, Accountancy and Business Support providing overall coordination of day to day operational processes for the services.
* Liaison with Internal audit to provide explanations and assurance in key financial procedures

**External** * Regular, telephone and email contact with members of the public as a point of contact for enquiries, and occasional face to face contact.
* Other government agencies such as DWP, DCLG, HMRC, VOA regarding legislative enquiries, advice and statutory requirements.
* Representatives of local businesses including landlords, suppliers and contractors.
* Occasionally deals with people in difficult and pressured situations who may be in a distressed state or displaying challenging behaviour.
* Customer assistance organisations acting as 3rd parties such as C.A.B and Age Concern about eligibility issues, hostel managers, Women’s Aid, RSL’s and other external agencies on housing and associated matters.
* Contact with and appearances at the Tribunal Service and Magistrates Court regarding appeals and matters of income recovery.
* Regular contact with Bailiffs and enforcement agencies regarding debt recovery.
* Scheduled contact with external audit to provide detailed explanations.
* Regular contact with CYC’s main software suppliers to discuss matters of a complex technical nature.
* Contact with other local authorities through sharing good practice, user groups, site visits etc. Forming a strong relationship to provide each other support in the wider network.
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|  **6.** | **DECISIONS – discretion & consequences**The Technical Officers, working with the Team Manager, need to ensure the day to day technical and system operational delivery of the services is in line with corporate policy, procedures and legislation. The consequences of failing to deliver the above would result in significant personal consequences for thousands of customers, and financial issues for the local authority. This wider impact of this could be felt across a number of other services and organisations. Degradation to the Revenues and Benefits Service delivery would be a significant challenge to recover form due to its complex and involved financial nature. Failure to meet its obligations and targets could mean central government taking control and cause significant damage to the council reputation.* Responsibility for daily payment and processes with BACS payment transmissions of up to £1.5m providing essential payments to approx 11,000 customers. Delays can result in problems for customers including rent arrears and evictions if not carried out in a timely manner.

 * Requirement to verify and authorise bi-monthly Direct Debit payments for CTAX and NDR collection calling instalment income of £200m from 60,000 customers across the year. Accuracy and timing are essential to collect the correct amounts of money from customers and businesses. The consequences for transmitting the incorrect file could impact dramatically on the authority and its customers.
* The system administration of the revenues recovery cycles also has drastic consequences of being incorrect. Efficient running of these procedures secure over £200m of income for the authority. If the correct processes and procedures are not followed it could have a significant effect on the authority cashflow and income. There is also the possibility of the bills being invalid if not issued in accordance with the regulations.
* Technical officers will be required to assist with the annual billing/year end system setup and processing. This will involve bulk processing and amending values and parameters in the core databases that form the basis of Housing Benefit and CTR calculations and also the values on customers CTAX and NDR bills. This is a very important exercise, accuracy and understanding what the changes mean is essential as one action can affect many thousands of customers. Trying to recover from a significant error would be very difficult and damaging to the authority, while at the same time having a detrimental impact on large volumes of often vulnerable customers.
* Discretion is a large part of the Technical officer role. The Technical Officer has the discretion to overturn a decision previously made when the original decision has been challenged by the customer or their representative. In doing this the officer must have a thorough understanding of the regulations and legislation surrounding Revenues and benefits. They must also understand the impact that any such decision will have at a service, departmental or corporate level. Decisions may be challenged further and result in high profile complaints and appeals. In retrospect the officer must provide guidance and advice to revenues and benefit team members in all aspects of their decision making responsibilities.
* The technical officers will also process decisions related to separate discretionary schemes and awards on a daily basis. Many cases must be assessed on a case by case basis considering the particular complex circumstances for each scenario. For housing benefit this will affect vulnerable customers through DHPs, discretionary CTR payments and YFAS review cases. Awards will enable customers to stay in their own home or provide day to day essentials such as white goods or food vouchers, consequences of making the wrong decision can be drastic on customers and their families wellbeing. On the revenues side they will asses applications for write offs or discretionary payments to customers under section 13a, or support businesses to survive in the local economy, and propose their recommendations to the Council Tax Supervisor and Senior Technical Officer for their final decision.
* The quality assurance that is carried out on calculations and assessments relating to revenues and benefits cases is an important check that work is being actioned in accordance with council policy and central government legislation. Accuracy in monies paid out/collected is vital to customers and CYC alike. Errors in this area can have subsidy implications/decreased income for council budgets. It can also cause problems with audit assurance and result in central government penalties.

 * As experts in revenues and benefits processing, officers will train staff on procedures, processes and changes in legislation. Training will be delivered both individually and in groups. Delivery and understanding of the training is essential to the authority, if the training is incorrect the entire service can administer work incorrectly.
* There is significant scope to promote positive service improvements by recommending changes in procedure and service delivery to managers to improve efficiency. A change to the system parameters or staff working practice can have exponentially positive effects on service performance. Efficiencies can be directly translated into increased customer satisfaction levels and more effective financial management, which is essential in the current digital and financial climate.
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| **7.** | **RESOURCES – financial & equipment***(Not budget, and not including desktop equipment.)* Description Value   |
| **8.** | **WORK ENVIRONMENT – work demands, physical demands, working conditions & work context**Work demands* The job holder has to deal with conflicting demands and unplanned work reacting instantly to local needs caused by seasonal demands or unexpected occurences.
* Able to work to and meet deadlines and performance targets without direct supervision and to cooperate with and influence others to achieve common goals and objectives.
* The post holder will respond to customer contact through all communication channels.

Physical demands* Normal office environment within a back office secure location and within an open customer centre meeting with customers/visitors. Security is on site at all times.
* Frequent keyboard and computer use.

Working conditions* Normal office environment and some working from home
* Works under pressure when reacting to peaks in workload and on own initiative.
* Attendance at Benefits first Tier Tribunal's, Upper Tier Tribunals and Revenues Valuation Tribunals.
* Revenues magistrates court hearings

Work context* The post holder will take a flexible approach to changing work patterns of work within the service to meet business needs and will undertake such duties as are consistent with the job purpose and grade of post.
* Ability to handle customer contacts of a varying nature, occassionally deal with distressed / difficult customers, who may also wish to log disputed decisions, appeals or complaints, with the ability to remain friendly and positive.
* Some exposure to abusive/aggressive language or behaviour.
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| **9.** | **KNOWLEDGE & SKILLS**In order to be a technical specialist in the Revenues and Benefits arena, the post holder will have normally spent several years learning the areas in detail.This requires expert knowledge and experience relating to the legislation, technical systems, procedures and operational requirements. Examples of the specific knowledge and skills are shown below:-* Excellent numeracy, analytical and technical skills to interpret and advise on financial information.

 * High degree of computer literacy. Confident in the use of a number of computer packages is required on a daily basis e.g. Northgate, CRM etc
* Excellent IT skills, including use of spreadsheets, reporting tools, database management and reconciliation.
* A sound understanding of banking practices, reconciliation and interrelationships between financial systems.
* An analytical approach to data with the means to understand, work, interpret and communicate complex statistical data making sound financial judgements.
* Confident understanding and application of principles and procedures. Will be dealing with large volumes of confidential personal and financial data.
* Excellent organisational ability, to ensure system process and procedures are properly managed.
* Managing own time and workload to meet deadlines within acceptable quality and productivity standards. Able to work to and meet deadlines and performance targets without direct supervision with conflicting priorities. Positive approach to team work.
* Well developed problem solving and investigative skills and ability to work under own initiative.
* Ability to make sound, well thought through suggestions for continuous improvement in day to day work and in the overall service delivery.
* Ability to respond to situations quickly and demonstrate flexibility.
* Experience of a change and project management in a constantly moving environment, reacting and implementing solutions to legislative and technological changes.
* An understanding of Performance Management expectations and compliance.
* Able to identify performance problems and training issues with a view to reviewing and improving working practices and procedures.
* Able to anticipate issues in advance and take the appropriate course of action to reach a successful conclusion.
* Experience of undergoing and supporting organisational change.
* Experience of working in a revenues and benefits service across a range of disciplines e.g. appeals, discretionary housing payments, disputed decisions, stakeholder claims and overpayment processing.
* Ability to operate on a discretionary basis under pressure in complex and emotive situations.
* A comprehensive understanding of how the revenues and benefits systems work, including a detailed knowledge and understanding of Housing Benefit, Council Tax and NDR Regulations and the Social Security act 1992.
* Detailed in-depth specialist knowledge and understanding of legislation and case law and research. Good understanding of how to interpret and apply it across all customer types, including the more complex cases. Able to analyse complex case information and make sound decisions.
* Able to retain and keep their knowledge base up to date as technology and legislation changes within the services
* Detailed in-depth practical knowledge and understanding of how the Tribunal and court system works.
* Experience of supervising staff including allocating work and ensuring work is completed.
* Motivating influencing and developing staff, through coaching and training. Ability to motivate and lead groups or individuals.
* Able to establish, maintain and develop effective working relationships at all levels.Effective interpersonal skills with the ability to influence attitudes and communicate effectively.
* Excellent communication skills (verbal and written) and active listening skills, able to communicate courteously and effectively using all contact channels using plain English to interpret complex information for customers..
* Speaking in public (advocacy, training and presentations).

**Ability to converse and provide advice and guidance to members of the public, in spoken English, to Common European Framework of Reference for Languages (CEFR) - level C2** - Mastery or proficiency - Can express him/herself spontaneously at length with a natural conversational flow, avoiding or backtracking around any difficulty so smoothly that the person with whom they are conversing is hardly aware of it. Can understand with ease virtually everything heard or read. |
| **10.** | **Position of Job in Organisation Structure**Job reports to: Revenues & Benefits Senior Technical OfficerOther jobs at this level; 1 X GD 7 Council Tax Team Leader THIS JOBJobs reporting up to this one: N/A |