

Court of Protection and Appointee Caseworker

Finance Assistant (G4)

Finance Technician (G5)

Job Brief

The Court of Protection and Appointee Caseworker role helps manage the finances of vulnerable adults who lack capacity to manage their own affairs. The role oversees a caseload of Appointeeship and Deputyship clients, safeguarding their financial wellbeing and ensuring decisions are made in their best interests in line with the Mental Capacity Act 2005, Court of Protection authority, Department for Work and Pensions Appointeeship responsibilities and Office of the Public Guardian standards.

Post holders manage day-to-day financial arrangements, including income, benefits, pensions, payments, debts, care costs and financial records, ensuring client finances are administered safely, accurately and in a timely manner.

A key part of the role is building positive relationships with clients, families, carers, care providers, Adult Social Care colleagues and partner organisations. Effective casework helps ensure financial arrangements reflect each client's needs and wider care circumstances, while providing support through what can often be complex or sensitive situations.

The role requires good judgement, attention to detail and an understanding of risk, with responsibility for identifying and escalating safeguarding concerns, suspected financial abuse and other complex issues where additional support or intervention is needed.

Expectations of the Role

Court of Protection and Appointee Caseworkers are expected to:

- Oversee a caseload of Appointeeship and Deputyship clients, supporting the safe management of their financial affairs.
- Act in line with the Mental Capacity Act 2005, Court of Protection authority, Department for Work and Pensions Appointeeship requirements and Office of the Public Guardian standards.
- Manage client income, benefits, pensions, payments, debts, care costs and personal spending arrangements.
- Make and evidence best interest decisions, promoting least restrictive options and supporting client independence where possible.
- Maintain accurate, up-to-date and audit-ready case records and financial records.
- Complete reviews, reports and financial documentation, including annual reports to the Office of the Public Guardian.

- Build effective working relationships with clients, families, care providers, Adult Social Care teams and other partner services.
- Communicate clearly, sensitively and professionally, particularly where matters are complex, sensitive or legally significant.
- Identify, manage and escalate safeguarding concerns, financial risks, debt, arrears or suspected financial abuse.
- Liaise with external organisations such as the Department for Work and Pensions, Office of the Public Guardian, banks, solicitors, creditors and other professional partners.
- Manage workload effectively, balancing competing demands and meeting statutory, regulatory and service deadlines.
- Continue developing knowledge of Appointeeship, Deputyship, welfare benefits, safeguarding, financial case management and relevant legislation.

Progression Approach

The Court of Protection and Appointee Caseworker role is a career-graded role, providing a structured pathway from Finance Assistant (G4) to Finance Technician (G5). The role supports the progressive development of knowledge, skills and experience across Appointeeship, Deputyship and wider financial case management work.

Post holders are expected to build knowledge, confidence and judgement while managing a designated caseload within defined procedures and with appropriate support. This includes developing a sound understanding of the Mental Capacity Act 2005, Office of the Public Guardian standards, Court of Protection requirements, Appointeeship responsibilities, welfare benefits and financial case management.

As experience develops, post holders will be expected to take increasing ownership of cases, work with greater independence, manage more varied or higher-risk work, and apply professional judgement in more complex situations. This may include cases involving property, investments, contested decisions, deceased client work, safeguarding concerns or complex family and professional relationships.

Development is supported through regular one-to-one discussions between the post holder and their manager. Together, they will review progress, identify development opportunities and agree a development plan focused on building the skills, knowledge and experience needed for future progression.

The service uses an Ambition and Potential Framework to support professional development. The post holder is the primary driver of their career, proactively identifying development goals, seeking learning opportunities and building the experience needed for the next grade. Managers act as coaches, providing feedback, support and access to development opportunities to help individuals achieve their potential.

Summary

The Court of Protection and Appointee Caseworker role offers an opportunity to develop specialist knowledge in Appointeeship, Deputyship and financial case management. The role combines technical financial work with strong customer service, partnership working and a clear responsibility to safeguard the financial wellbeing of vulnerable adults who lack capacity to manage their own finances.

Through a structured development pathway, regular coaching and a focus on continuous learning, post holders can progress their skills, broaden their experience and develop their career within the service.