



# Job Description Form

## Generic - Assessment Officer

### Private Administrator Support Branch

#### Position details

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Classification Level: 3

Award/Agreement: Public Service Award 1992 / Public Sector CSA Agreement 2019

Position Status: Permanent

Organisation Unit: Public Trustee, Trustee Services

Physical Location: Perth CBD

#### Reporting relationships

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Responsible to: 007270 Manager Private Administrator Support – Level 6

**This position: Generic - Assessment Officer - Level 3**

Direct reports: NIL

#### Overview of the position

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The Trustee Services Directorate is accountable for the provision of a comprehensive range of affordable, quality, secure and impartial trustee and asset management services to Western Australians.

The Directorate provides:

- Deceased estate administration
- Trustee services for infants and incapable persons
- Financial management services under Power of Attorney and Enduring Power of Attorney
- Providing support to and examining the accounts of Private Administrators

The Private Administrator Support Branch is responsible for providing support to private administrators appointed by the State Administrative Tribunal and examining the accounts submitted by private administrators on behalf of represented persons.

The Assessment Officer is responsible for managing a caseload of financial accounts submitted by private administrators. Tasks include the examining and reconciliation of accounts, analysing and seeking clarification from private administrator's concerning the management of Represented Person's finances, identifying incidents of financial abuse and non-compliance, raising and reporting queries, drafting correspondence and reports and providing general guidance to administrators pursuant to their roles, obligations and authorities within the *Guardianship Administration Act 1990*.

## **Job description**

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As part of the Private Administrator Support Branch team, the successful applicant will be expected to:

- Work to improve communication and model integrity and respect in all interactions
- Operate within the Department's Corporate Governance Framework, policies and procedures and ensure effective transparency and accountability of all Department activity
- Operate within the chain of command to coordinate activities required to meet the Department's strategic objectives
- Work collaboratively to achieve common goals and best practice and facilitate business improvements as appropriate.

## **Role specific responsibilities**

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### **Examination of Accounts**

Examines the financial accounts submitted by private administrators of a low to medium complexity typically to the value \$750,000 comprising of bank accounts, realty and investment portfolios.

- Manages a caseload of files for examination of accounts.
- Undertakes examination and reconciliation of accounts.
- Drafts reports and provides recommendations resulting from the examination of accounts submitted by private administrators.
- Exercises approved delegations in relation to the examination of accounts lodged by private administrators.
- Manages client files in the Management Accounting and Trust Environment (MATE) computer system and ensures that all data and transactions are recorded into the system.
- Communicate and report to internal and external clients in relation to a range of matters affecting the administration of financial accounts submitted by private administrators.
- Provides procedural information and advice to assist with compliance under the *Guardianship and Administration Act 1990*.
- Drafts correspondence to administrators and assists with compliance standards.
- Prepare and draft applications for lodgement with the State Administrative Tribunal concerning the review of administration orders.
- Other duties as required in accordance with strategic objectives, business plans, local workload priorities and performance management plans.

## **Job related requirements**

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In the context of the role specific responsibilities, the ability to demonstrate the following skills, knowledge and experience.

### **Shapes and Manages Strategy**

The ability to; understand the reasons for decisions made within the division and be able to explain how they are related to their work, identify issues that may impact on the achievement of goals and inform supervisor, utilise knowledge of the work environment to contribute to planning activities, draw information from a variety of sources and apply common sense to analyse what information is important/relevant are all important for this role.

### **Achieve Results**

The ability to; reschedule and reorganise work to reflect changes in priorities, demonstrate knowledge of new programs, plans or services that are relevant to the position, maintains accurate records and files; and, ensure that tasks are completed within allocated timeframes are all fundamental to this role.

### **Builds Productive Relationships**

The capacity to; build and maintain relationships with senior management colleagues and clients, share information with stakeholders and seek input from others to inform team discussions, ensure that relevant/important information is shared where required, treat people with respect and courtesy and to act on constructive feedback are requirements for this role.

### **Exemplifies Personal Integrity and Self-Awareness**

A commitment to; adhere to the Code of Conduct in all interactions, behave in a honest professional and ethical way, check and confirm the accuracy of all information prior to release, take responsibility for the completion of work and seek guidance where necessary, stay calm under pressure and not react personally to criticism, acknowledge mistakes and learn from them, meet agreed performance levels and seek and accept supervisor feedback and guidance are all important for this role. Engage with risk by providing accurate information, seeking guidance when required and reporting potential risk issues to supervisor.

### **Communicates and Influences Effectively**

An ability to; structure messages clearly and succinctly orally and in writing, gain a clear understanding of others comments by actively listening and asking questions to ensure understanding – check that own views have been understood and that issues are discussed and considered thoughtfully without becoming aggressive are requirements for this role.

**Role Specific Criteria**

- The ability to examine, reconcile, interpret and report on the management of financial accounts and identify matters of non-compliance.
- The ability to interpret and apply relevant policies and legislation.

**Special requirements/equipment**

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Nil

**Certification**

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The details contained in this document are an accurate statement of the duties, responsibilities and other requirements of the job.

Public Trustee

Signature: \_\_\_\_\_ Date: 20/10/2020

HR certification date: October 2020