



Job Description Form

Generic Assessment Officer

Private Administrator Support Branch

Position details

Classification Level: 4

Award/Agreement: Public Service Award 1992 / Public Service and Government Officers
CSA General Agreement 2017

Position Status: Permanent

Organisation Unit: Public Trustee, Trustee Services

Physical Location: Perth CBD

Reporting relationships

Responsible to: 007270 Manager Private Administrator Support – Level 6

This position: Generic Assessment Officer - Level 4

Direct reports: NIL

Overview of the position

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 the management of a caseload of matters regarding the conduct and supervision of finances controlled by appointed Administrators,

including the examination of accounts submitted by Administrators. Liaises with relevant stakeholders in the management of administrator accounts.

Job description

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
- Facilitate cultural and management reforms within the Department through leadership and engagement
- Represent the Department's interest on committees and working groups as required.

Role specific responsibilities

Examination of Accounts

Examines financial accounts submitted by administrators of a medium to high complexity typically between the values of \$500,000 - \$1.25M comprising of bank accounts, realty and investment portfolio's.

- Manages a caseload of accounts.
- Examines, reports and provides recommendations regarding the allowing of accounts submitted by administrators.
- Exercises approved delegations in relation to the examination of private administrator accounts.
- Provides guidance and support regarding practice and procedure in the examination of administrator accounts.
- Attends the State Administrative Tribunal to provide procedural and case management advice.
- Initiates appropriate strategies, investigations or other actions to ensure compliance.
- Drafts correspondence to clients and submits compliance reports.
- Provides on-the-job training to staff.
- Other duties as required in accordance with strategic objectives, business plans, local workload priorities and performance management plans.

Job related requirements

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 and how they are related to their work, understand the work environment and identify issues that may impact own achievement and contributes to team planning, draw on information from a range of sources and to use common sense to analyse what information is important, anticipate issues that could impact on tasks and identify risks and uncertainties in procedures and tasks are all important for this role.

Achieve Results

The ability to; monitor progress against performance expectations to ensure deadlines are met, communicate outcomes to supervisor, apply and develop capabilities to meet performance expectations, demonstrate knowledge of new programs, products or services relevant to the position, work to agreed priorities, outcomes and resources and be responsive to changes in requirements are fundamental to this role.

Builds Productive Relationships

The capacity to; build and maintain relationships with team members, other teams, colleagues and clients, share information with team members, seek input from others, contribute to team discussions and ensure that others are kept informed, maintain an awareness of personalities, motivations and diverse qualities, treat people with respect and courtesy and an ability to act on constructive feedback.

Exemplifies Personal Integrity and Self-Awareness

An ability to; listen when own ideas are challenged, provide accurate advice to colleagues and clients and to check and confirm the accuracy of information prior to release, take responsibility for mistakes and learn from them, acknowledge when in the wrong, seek advice and assistance from colleagues and supervisor when uncertain. Engage with risk by providing accurate information, seeking guidance when required and reporting potential risk issues to supervisor.

Communicates and Influences Effectively

A demonstrated ability to; structure messages clearly and succinctly orally and in writing, focus on gaining a clear understanding of others comments by listening and questioning for clarity, check that own views have been understood, listen to differing ideas to develop an understanding of the issues are essential in this role.

Role Specific Criteria

- The ability to examine, interpret and report on the management of financial accounts and identify matters of non-compliance.
- Knowledge of the legislative requirements and administrative procedures relating to represented persons pursuant to orders of the State Administrative Tribunal.
- Practical knowledge of Tribunal and/or Court operations and protocols.

Special requirements/equipment

Nil

Certification

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

Public Trustee

Signature: _____ Date: 26 Oct 2022

HR certification date: October 2022