Government of Western Australia
Department of Justice

Job Description Form

Trust Officer

Trust Management Branch

Position details

Classification Level: 2

Award/Agreement: Public Service Award 1992 / Public Sector CSA Agreement (and subsequent agreements)

Position Status: Permanent

Organisation Unit: Public Trustee - Trustee Services

Physical Location: Perth CBD

Reporting relationships

Responsible to: Senior Trust Manager (Generic) – Level 6

This position: Trust Officer (Generic) – Level 2

Direct reports: NIL

Overview of the position

The Trustee Services Directorate comprises of the Trust Management Branch, Estate Management Branch and Private Administrator Support Branch.

The Trust Management Branch is responsible for the administration of the financial affairs of clients who suffer from cognitive functioning and physical difficulties who can no longer manage their financial affairs.

A Trust Officer undertakes a compulsory in-house 12-week training program to develop knowledge in the Management Accounting and Trust Environment (MATE) computer system and in the policies and procedures associated with Trust Management administrations.

Training is both classroom based and on-the-job. A mentor will assist you with understanding the role of a Trust Officer. You will receive training in opening client files in MATE, gathering financial information, processing of receipts and payments, reconciling statement of accounts, answering telephone enquiries, applying book-keeping skills and drafting correspondence are part of the overall training plan.

Job description

As part of the Trust Management Branch team, the successful applicant will be expected to:

- Always consider the unique risks associated with the Department's activities when undertaking all duties.
- Communicate effectively, 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 Department's chain of command to coordinate activities required to meet the Department's strategic objectives.
- Work collaboratively with staff in other directorates and within the division to achieve common goals and best practice and facilitate business improvements as appropriate, demonstrated analytical problem-solving skills, customer focus and alignment with Departmental strategic objectives.
- Drive and support organisational change and continuous improvement by actively contributing to achieve the Department's vision, mission and priorities.
- Support cultural and management reforms within the Department.

Role specific responsibilities

Trust Administration

Under instructions of a Trust Manager, a Trust Officer undertakes training and assists with the management of client files by performing the following tasks:

- Creates Trust client files in the Management Accounting and Trust Environment (MATE) computer system.
- Undertakes research to identify client income, assets and expenditure.
- Prepares financial statements and undertakes reconciliation of financial transactions against client accounts.
- Assists with data entry of receipts and payments into the Management Accounting and Trust Environment (MATE) computer system.
- Assists with the preparation and drafting of correspondence and reports.
- Undertakes records management tasks as requested and maintains an accurate and effective correspondence file tracking and recording system.
- Deals with client telephone enquiries and is respectful of the diversity of the audience and information, adapting communications as necessary.
- Undertakes training and understanding of client's access to Centrelink benefits, Aged care access, Nursing home agreements and fees etc, to develop into a case manager.
- 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 Department's values and objectives how they are relevant in assigned work, and to work under direct supervision to meet timelines and priorities.

Achieve Results

The ability to see tasks through to completion; rescheduling and reorganising work to reflect changes in priority. Applies own expertise to work tasks, learn new products and services and maintain accurate records and file.

Builds Productive Relationships

The capacity to responds under direction to changes in client needs and expectations, manage progress and keeps clients informed and provide prompt and courteous service, as well as the capacity to recognise the value of individual differences and work styles.

Exemplifies Personal Integrity and Self-Awareness

A demonstrated commitment to adhere to the Code of Conduct, behave honestly and ethically. Applies self to meet objectives, stay calm and professional under pressure, and provide accurate information to others. Provides accurate information, checks and confirms accuracy prior to release. Acknowledges mistakes and learns from them and seeks guidance and advice when required.

Communicates and Influences Effectively

The ability to explain information using language appropriate to the client while limiting the use of jargon, listen and ask questions to ensure understanding and to confirm that the message has been understood and to discuss issues calmly.

Role Specific Criteria

Financial Skills
The ability to reconcile accounts and audit income and expenditure statements and assess personal income budgets for clients.

Interpretation
The ability to read, understand and apply departmental policies, procedures and legislation.

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: Sept 2024

HR certification date: September 2024