

**Job Description**

**Job Title:** Personal Health Budget Advisor

**Responsible to:** Personal Health Budgets Lead

**Salary:** £21,268 pro rata (FTE £26,585) plus 8% pension

**Hours:** 28 hours per week

**Term:** Fixed term contract March 2026

**Job Purpose:**

To contribute to the delivery of a highly effective Personal Health Budgets (PHB’s) service by:

* Providing information advice and support to those in receipt of personal health budgets to meet their support needs.
* Enable recipients to plan, arrange and manage their chosen care, in-line with agreed care plans.
* Understanding of health goals and demonstrate ways in which health needs are met in the process to achieve better health outcomes for recipients.
* Working with other health and social care professionals to achieve and support the delivery of PHB’s.
* Support recipients to recruit, employ and manage personal assistance, as required.
* Work with the governance of PHB’s principles and guidance and within Sefton Carers Centre policies and produces.

**Key duties and tasks**

1. To provide advice and support to recipients and their representatives.
2. Create new personal health budget services for recipients via a pre-paid card system holding accounts and dedicated accounts, as required.
3. Provide support and information for recipients, in line with care plans which promotes choice and independence.
4. Liaise with Sefton Advocacy and recipients to ensure understanding and control of personal health budget decision-making.
5. Work within the agreed indicative budget, and take account of the principles of best value, to achieve the agreed health and wellbeing outcomes.
6. Liaise with the payroll team to support recipients with personal health budgets Personal Assistants.
7. Maintain, develop and update systems of recording personal health budgets, producing timely and accurate information when required.
8. Raise sundry debtors’ invoices and make payments to creditors, as required.
9. Co-operate with Sefton and Liverpool Place ICB, other partners and representatives of outside bodies to promote the efficient administration of the personal health budgets.
10. Assist in the development of the service and contribute towards achieving the team’s aims and objectives.
11. To provide DBS checks for the recruitment of Personal Assistants, ensuring compliance with regulations and organisational policy.
12. Deal with basic enquiries in a professional manner and to be aware of where to signpost carers for support within Sefton Carers Centre.
13. Demonstrate technical and professional expertise by maintaining knowledge of relevant legislation, policies, procedures, guidance, research findings and best practice, with a commitment to continual professional development.
14. To maintain and develop information leaflets and packs to support understanding of the service to new customers and professionals.

Health and Safety

It is the general duty of every employee to take reasonable care of their own health and safety

and that of others, and to co-operate with management in meeting its responsibilities under the

Health and Safety at Work Act. Any failure to take such care, or the contravention of safety

policy or managerial instructions may result in disciplinary action being taken.

Confidentiality

Employees are required to respect the confidentiality of all matters they may learn relating to

their employment, other members of staff and the general public.

Data Protection

Employees are expected to adhere to the regulations regarding the Data Protection Act (2018) in

accordance with Sefton Carers Centre’s policies and procedures.

Variation

The postholder may be required to undertake other duties commensurate with the role. Some

duties may be subject to variation changes and will only be made after consultation with the

postholder.

**Policy and Procedure Expectations**

Employees are required to comply with the data protection, health and safety and safeguarding protocols and all further procedures of Sefton Carers Centre.

Employees are required to comply with Sefton Carers Centre’s policies and procedures relating to Equality and Diversity.

Employees are required to maintain confidentiality of all information and records relating to the work of the project and Sefton Carers Centre.

**Supervision, Training and Development**

Employees are required to participate in regular supervision, appraisal and personal and staff development planning sessions, as required.

**Other Terms of Employment**

* A group pension scheme, comprising 8% employer contribution of gross salary.
* Enrolment into BUPA Health scheme after successful 6 month probation

* 25 days Annual Leave entitlement per year, in addition to the 8 Statutory Public Holidays (pro-rated for part-time employees). This entitlement increases after 5 years of service as below:

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| --- | --- | --- |
| **Complete years of service** | **Additional days holiday in a complete holiday year** | **Total annual entitlement in a complete holiday year** |
| 5 years’ service | 2 days | 27 days |
| 7 years’ service | 1 day | 28 days |
| 9 years’ service | 1 day | 29 days |
| 10 years’ service | 1 day | 30 days |
| 15 years’ service | 2 days | 32 days |
| 20 years’ service or more | 3 days | 35 days |

* An unconditional offer of employment will be made to the successful candidate subject to successful completion of the following pre-employment screening checks:
* Evidence of a satisfactory Enhanced Certificate of Disclosure certificate from the Disclosure Barring Service
* Evidence to confirm the candidate’s Right to Work in the UK
* Receipt of two references, satisfactory to Sefton Carers Centre



#### **Person Specification**

#### **Personal Health Budget Advisor**

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| Qualifications | **Essential** | **Desirable** |
| GCSE (or equivalent) in Mathematics & English Language at Grade 4/C or above | X |  |
| Experience | Essential | Desirable |
| Knowledge and experience of working in or with public and voluntary organsiations | X |  |
| Experience in using IT including Microsoft Word and Excel | X |  |
| Experience of working in a health/social care professional organisation | X |  |
| Experience of an Adult Social Care department |  | X |
| Preparation of budgets and knowledge of account procedures |  | X |
| Knowledge of Personal Health Budgets |  | X |
| **Skills** | **Essential** | **Desirable** |
| Excellent communication skills | X |  |
| Ability to work under pressure and meet set deadlines | X |  |
| Ability to use information technology (Word Processing, Databases, Spreadsheets) | X |  |
| Ability and commitment to maintaining confidentiality of information relating to the organisation | X |  |
| Ability to organise and prioritise own workload | X |  |
| Ability to analyse problems and adapt an innovative approach to finding solutions | X |  |
| **Personal Attributes** | **Essential** | **Desirable** |
| Ability to work with people in a sensitive way | X |  |
| Ability to communicate, negotiate and liaise with other people and organisations | X |  |
| Commitment to continually develop and update knowledge | X |  |
| Ability to work as part of a team and on own initiative | X |  |
| Flexible and proactive attitude | X |  |