



Role Specification: Care Manager

Line Management

A Care Manager reports to the Registered Branch Manager.

Position Summary

- To support the Registered Branch Manager and actively contribute to business growth and company development.
- To be committed to the wellbeing, welfare and safety of our clients, their families and the care team.
- To deliver excellent customer service to clients/funders and manage and lead the care team.
- To be aligned with the company's values and act as an ambassador to set outstanding examples of professionalism.

Responsibilities

Service Enquiry Sales

1. Ensure high levels of customer satisfaction through excellent sales service.
2. Effectively and professionally handle service enquiries from potential clients.
3. Welcome and greet enquirers visiting the branch.
4. Confidently provide accurate company information and service features and benefits to enquirers while ascertaining customers' needs and wants.
5. Electronically record all required details of the enquiry and ensure appropriate colleagues are notified in a timely manner.
6. Prepare company brochure information to be issued to enquirers' ensuring this is delivered within given timescales.
7. Adhere to the company procedures to ensure all enquiries have the correct follow up action applied within pre-determined timescales.
8. Take responsibility for securing lead appointments with potential customers.
9. Organise and attend lead appointments with potential clients and their families with full responsibility for securing the sale by converting them to a fully signed-up client of Bright Care.

10. Ensure the sale is capitalised upon by discussing the range of services Bright Care offers and the journey the client can expect to go on with Bright Care as their care needs change.
11. Complete all record keeping procedures applicable to service enquiries for the branch.
12. Provide and monitor statistical information for the branch in relation to service enquiry details and conversion ratios.
13. Be target driven in your approach to converting suitable leads to full customers.

New Customer Process

1. Undertake care planning assessment of a new client at their home including providing terms and conditions of contract information and obtaining signature in agreement.
2. Build a rapport with a new client understanding their needs and establishing their chosen outcomes.
3. Ensure assessments fully take into account the clients wishes and choices and promotes their independence, while also including views of their family or chosen representatives.
4. Fully responsible for ensuring the package of care as agreed at the assessment is organised, set up and delivered with all details of the agreed care recorded in the care planning documentation.
5. Carefully match Bright Carer(s) to deliver the agreed care service and introduce and host introductory meeting with the client, their chosen family/representatives and the Bright Carer(s).
6. Establish any adjustments or finer details of the care plan during the introductory meeting fully involving the Bright Carer, client and their chosen representatives.
7. Complete company procedure for New Client Set Up ensuring each step is actioned according to company policy.
8. Record all information accurately in both paper format and electronically using company software systems and within pre-determined time scales.
9. Responsible for collating client home records folder and implementing the folder in the client home.
10. Manage the new service by regularly communicating with the client, their family and the attending Bright Carers, including home visits, to make necessary adaptations as required. This is an ongoing process expected for the duration of a client's care service.
11. Record and document all communication between Bright Care, the client and their family and the Bright Carer's using company software systems creating an audit trail of action taken, adjustments to the care planning documentation and outcomes achieved. This is an ongoing process for every care service.
12. Report all new client information directly to the Registered Branch Manager.

Clients and Administration

1. Provide a quality in-home care service to older people who require assistance with their activities of daily living.
2. Be responsible for, and the designated Manager of, a portfolio of clients and their care services in adherence with company policy. This includes undertaking face-to-face regular reviews and immediate reviews in response to changes of circumstances, of each client's care package.
3. Be committed to the relationships formed with clients and their families and dedicated to working with the client to achieve their chosen outcomes.

4. Manage all aspects of a client's care and support for the duration of their journey with Bright Care.
5. Ensure the wellbeing of clients by responding effectively to emergencies.
6. Responsible for undertaking and completing all care records associated with clients to an exceptionally high standard and in great detail, including care plans, risk assessments, reviews and medication charts.
7. Systematically review each client's care service with them and update all care plan documentation accordingly and organise any adaptations as agreed.
8. Organise and attend client meetings, including multi-disciplinary meetings, with a client's best interests central to all decision making and aligned with company policy.
9. Fully responsible for communicating schedule changes, concerns, and any other pertinent care-related issues directly to clients/families and the care team.
10. Handle client and family telephone enquiries and take responsibility for applying follow up action with a view to resolving the issues or query.
11. Oversee and organise introductions of selected Bright Carers to clients prior to them providing direct care.
12. Responsible for the ongoing maintenance and upkeep of the client home records ensuring the information contained within is always accurate, factual and reflects the current care service and agreements.
13. Respond to all accidents and incidents immediately and complete action plans and reports ensuring preventative control methods are implemented and to a standard acceptable by our regulatory bodies.
14. Report all incidents and accidents to the Registered Branch Manager and provide all necessary documentation for notification to regulatory bodies.
15. Effectively and professionally deal with any complaints, concerns or issues that arise in a timely manner and work in partnership with all parties involved to reach mutual agreements that are in accordance with company policy and in the best interest of the company and all parties concerned.
16. Document reports and actions taken for all complaints and fully inform the Registered Branch Manager at the start of the complaint process.
17. Maintain professional boundaries between yourself and clients and their families, at all times.
18. Responsible for obtaining and processing Client Questionnaire feedback and developing action plans in response to any issues or concerns contained within.
19. Undertake and record client monitoring calls as part of our quality assurance procedures.
20. Ensure internal office client files are created for each client and organised systematically according to company procedure.
21. Ensure all electronic client records on company software are organised and displayed in a systematic manner while adhering to confidentiality constraints.
22. Responsible for carrying out the 'client closedown' procedure ensuring each stage is completed accurately.
23. Provide statistical information based on client details as directed by the Registered Branch Manager.
24. Understand that there may be occasions when you are required to provide direct care to clients therefore you must be able to meet the physical demands involved in providing care and adhere to all Bright Carer responsibilities in doing so.

Recruitment and Training

1. Take an active role in the recruiting and hiring of Bright Carers and interviewing prospective candidates.
2. Ensure interviews are scheduled in agreement with the Recruitment Coordinator and Registered Branch Manager.
3. Prepare all candidate information and interview documentation prior to interview being conducted.
4. Responsible for ensuring all successful and unsuccessful interviewees are notified of their status.
5. Responsible for following safer recruitment procedures by ensuring required suitable references are obtained, disclosure applications completed and returned and documentary evidence on record.
6. Maintain all records for each candidate's progress using software systems.
7. Organise and schedule candidates to attend pre-start induction training at the Training Academy ensuring they are given full details of this schedule, and organised in collaboration with the trainer.
8. Communicate with candidates throughout the set-up process ensuring each stage of set up is completed as swiftly as possible.
9. Prepare and send all required documentation to the company Payroll Administrator.
10. Care Managers are responsible for the organising and planning of Bright Carers ongoing mandatory and progressive training throughout their employment with Bright Care.
11. Work in alignment with the Registered Branch Manager to plan timings for recruitment of salaried Bright Carers to maximise efficiencies.
12. Deliver any Bright Care training as directed by, and to support, the Staff Training and Development Manager.

Bright Carers and Administration

1. Be responsible for, and the designated manager of, a portfolio of Bright Carers and their employment with Bright Care in adherence with company policy. This includes undertaking regular supervision meetings, direct field observations, team meetings, and training and development planning.
2. Manage and lead the Bright Carers to provide a quality in-home care service to older people who require assistance with their activities of daily living.
3. Be committed to the relationships formed with Bright Carers and dedicated to working with them on an individual basis to develop their knowledge, skills and motivate each Bright Carer to realise their full potential.
4. Motivate Bright Carers to embrace opportunities for career development and advancement and support them to achieve their goals.
5. Ensure the wellbeing of Bright Carers by responding effectively and supporting them with any concerns, issues or emergencies they encounter.
6. Maintain professional boundaries between yourself and Bright Carers, at all times.
7. Understand your Bright Carers needs and qualities to enable good matching processes between Bright Carers and clients.
8. Systematically supervise each Bright Carer by using the company's variety of supervision methods. All supervisory discussions must be documented to an exceptionally high standard and in great detail to include an achievable action plan and agreed goals or targets.

9. Organise and schedule one-to-one meetings and team meetings with Bright Carers providing a forum for honest and open conversations, motivation to share ideas and opinions and encouragement to reflect on practice.
10. Be flexible in your approach understanding that some meetings may have to be scheduled out with normal working hours.
11. Take responsibility for implementing disciplinary procedures to address performance issues as directed by the Registered Branch Manager and in accordance with the company policies and regulatory bodies.
12. Fully responsible for ensuring Bright Carers understand their responsibilities as per the company Role Specification and comply with all company policies and procedures and statutory requirements.
13. Provide all Bright Carers with the correct documentation they require within a client's home to enable them to perform their role effectively.
14. Manage Bright Carers activities with clients; have knowledge of each care visit they are attending, their requirements during those care visits and the documentation the Bright Carer's must complete at each visit for each client.
15. Monitor a Bright Carer's record keeping within a client's home. Address any issues immediately and audit all data for discrepancies.
16. Respond to a Bright Carer's reports of accidents and incidents immediately and undertake and complete action plans in response ensuring all parties involved are supported and understand their responsibilities in achieving the action plans.
17. Accident and incident reports to be finalised by the Care Manager containing each stage of the action taken, preventative measures implemented and the outcome. Every report to be completed to a standard acceptable by our regulatory bodies.
18. Report all accidents and incidents to the Registered Branch Manager and provide all necessary reports for notification to regulatory bodies.
19. Fully responsible for communicating schedule changes, concerns, and any other pertinent care related issues directly to Bright Carers.
20. Handle Bright Carer telephone enquiries and take responsibility for applying follow up action with a view to resolving the issues or query.
21. Ensure Bright Carers are given all information relating to the clients they are due to attend prior to any care visits. This includes pre-discussion, reading and understanding of each client's care planning documentation.
22. Oversee and organise introductions of selected Bright Carers to clients prior to them providing direct care. This may be undertaken in the form of shadow visits for an already established package of care.
23. Responsible for undertaking and completing all employee records to an exceptionally high standard and systematically organised and displayed while adhering to confidentiality constraints.
24. Responsible for obtaining feedback from Bright Carers on all aspects of their day to day activities and their suggestions on branch improvements and company future developments.
25. Follow the Bright Carer Closedown procedure ensuring each stage is completed accurately.
26. Provide statistical information based on Bright Carer details as directed by the Registered Branch Manager.

Scheduling

1. Fully operate the company scheduling software to generate weekly work rosters for Bright Carers and assign care visit schedules as per a client's needs and care planning agreements.
2. In scheduling, the Care Manager must take into account the company's matching processes and pre-introductory of Bright Carer/client systems. This also includes Bright Carers having access to specific care planning details prior to attending care visits. Therefore, scheduling requires great thought and planning skills applied by the Care Manager and branch team collectively.
3. Input all necessary details for both Bright Carers and clients into the scheduling software system. This includes contact and address details, funders, access requirements.
4. Ensure Bright Carers have access to the scheduling application on their devices and check their application on a daily basis for their work roster details.
5. All rosters to be completed by a set deadline and follow up confirmation sought. Bright Carers to be notified their rosters are ready and specific clients issued with a schedule of visits.
6. Work in partnership with the branch Care Managers and Registered Branch Manager to establish regular working patterns for Bright Carers and assign visits based on client needs and preferences.
7. Take charge of all changes and amendments in our scheduling software, responding to clients and Bright Carer requests and pre-planning scheduling difficulties such as holiday cover and care package increases.
8. Ensure all scheduled visits have accurate rates applied both for invoice and payroll purposes.
9. Responsible for recording additional amendments out with scheduling software for the accuracy of invoicing and payroll.
10. Completed rosters to be confirmed on a weekly basis as directed by the company Finance and Payroll team.
11. Work with the branch team to schedule and assign for new care packages, recruits, training, and meetings ensuring consistency and continuity always prevails.
12. Responsible for notifying Bright Carers and clients of scheduling changes and obtaining their agreement to the proposed changes.

On Call

1. Care Managers are responsible for being the on-call operator for the branch out of office hours Mon-Thur. This is on a rotational basis with the branch Care Managers and Registered Branch Manager.
2. All company Care Managers are on a company rota system for being the on-call operator for all branches Fri-Sun.
3. The on-call operator takes full responsibility for client and Bright Carer emergencies, scheduling requirements and notification of changes. All reporting and record keeping procedures apply as described in this document.

Invoicing (in the absence of the branch Care Operations Assistant role)

1. Take full responsibility for the accurate billing of services to clients/funders.
1. Fully responsible for inputting invoices into the branch.

2. Generate invoices for the branch care services on a monthly basis issuing invoices to all client funders.
3. Responsible for ensuring invoices include all additional charges as appropriate to their care service.
4. Liaise with Care Managers and check scheduling software for anomalies that may affect accuracy of invoicing.
5. Handle client/funder queries in relation to their invoices.
6. Follow instruction from the company Finance Controller.

Expenses and Payroll (in the absence of the branch Care Operations Assistant role)

1. Responsible for receiving all expenses claims for the branch and subsequent checks for accuracy.
2. Oversee expense claims are submitted within given timescales in accordance with set payroll periods.
3. Overall responsibility for the accurate completion of expenses data and payroll amendments data in preparation for the company Payroll Administrator.
4. Maintain and file all expenses and payroll records according to company policy.
5. Follow instruction from the company Payroll Administrator.

Branch Finances and Business Growth

1. Have full knowledge of, and have readily available, financial data relating to your client portfolio and Bright Carer portfolio.
2. Understand the branch profit and loss on a week-to-week basis and develop plans with the Registered Branch Manager for increasing revenue and profit margins.
3. Responsible for achieving financial targets and operational targets as set by company KPIs.
4. Actively seek opportunities for marketing and promoting Bright Care including networking with strategic alliances, undertaking presentations and engaging with third party community groups.
5. Develop marketing plans with the branch team and in unison with the company Marketing Manager.
6. Organise, plan and participate in branch events for clients, Bright Carers and strategic alliances.

Auditing

1. Undertake monthly audit reports for submission to the Registered Branch Manager.
2. Assist the Registered Branch Manager in completing the monthly Branch Report for submission to company Director.
3. Assist the Registered Branch Manager in completing reports for our regulatory bodies.
4. Provide the company with statistical reports, data or records as requested.
5. Be involved in the Care Inspection process and any other external audits by providing documentary evidence in support of the branches operational.

Technology

1. Confidently operate all company electronic software systems.
2. Devise electronic documents using Microsoft software.

3. Proficient in using excel.
4. Ability to electronically type documentation with a high degree of accuracy and speed.
5. Confidently use email to communicate on a daily basis.

Communication and Participation

1. Communicate all client, Bright Carer and operational issues directly to the Registered Branch Manager in a timely manner.
2. All communications, whether verbal, visual or written, for internal or external use, must be conducted in a professional tone and context, and according to any applicable and existing company policies and standards.
3. Engage with colleagues, Managers and the company in a positive manner and openly give feedback and participate in shaping Bright Care's future development plans.
4. Attend and participate in branch meetings and company meetings as directed.
5. Participate in supervision sessions by measuring your performance, reflecting on your practices and continuously seeking to improve and enhance the quality of our service and your working practice.
6. Comply with the company's reporting procedures as dictated by company policies.

Relationships

1. Actively develop and maintain meaningful long-term relationships with clients, their families and Bright Carers.
2. Develop professional relationships with the Registered Branch Manager and colleagues within the branch team.
3. Bright Carers must support their colleagues and work unitedly as a team to ensure our clients are in receipt of the agreed care required.
4. Care Managers must support their colleagues and work unitedly as a team to ensure we provide excellent customer service and have a dedicated workforce.
5. Be committed to working unitedly with Bright Care and adding value to our services.

Presentation and Professionalism

1. Care Managers are the public face of the company and therefore must always be of a presentable and professional appearance.
2. Bright Care assumes professional appearance as being formal business wear.
3. Care Managers must be able to confidently and positively represent Bright Care at public meetings, events and at external conferences.

Training and Development

1. Be an active participant in our Training Academy, undertaking a full induction programme providing you with the skills and competencies to meet the requirements of your role.
2. Be proactive in the advancement of your training and skills base by seeking opportunities for personal and professional development.

3. Attend meetings and mandatory training as requested by the company.

Person Profile

Qualifications

1. Understanding of sales principles and customer service practices
2. Numeracy skills and financial acumen
3. Proficiency in English
4. Excellent planning and organisational skills
5. Proficient computer skills and operations of software systems.
6. Have, or be willing to work towards, the required SCQF level relevant to your role and in accordance with SSSC registration requirements.
7. Register with SSSC relevant to the role.
8. Possess or obtain PVG Scheme Membership in relation to working with vulnerable adults.
9. Willingness to undertake job related training as required by the company.

Experience

Proven track record in the provision of delivering excellent customer services within an office environment and being a high functioning member of a team.

Skills and Attributes

1. Eagerness to strive to perform the role with confidence, concern, commitment, cheerfulness, care and professionalism. Perform every responsibility with honour, and mindfulness of the client's dignity.
2. Excellent communication skills to engage with clients, Bright Carers, colleagues and other professionals.
3. The belief that in-home care is achievable for all clients and be committed to supporting clients through this journey as their needs change.
4. A commitment to working in partnership with clients, families, Bright Carers, colleagues and the company.
5. The ability to document clear and concise records appropriately and professionally, while understanding the constraints of confidentiality.
6. Be able to act responsibly and work on own initiative and as part of a team.
7. Ability to work under pressure and respond effectively to crisis situations.
8. Be self-motivated and proactive
9. Foster and encourage growth in yourself and others.
10. Build value in our service to others.
11. Ability to adapt to change and work in a flexible manner when required.
12. Excellent planning and organisational skills.

Core Values

Bright Care has six core values which we expect every Care Manager to uphold and be aligned with:

- **We have honest conversations.** Through embracing transparency, openness and straightforwardness, we pursue truthfulness with each other.
- **We are learners.** We realise that we're not finished products and are eager to grow and better ourselves. Humility lies at the heart of this.
- **We give freely.** Generosity comes in all shapes and sizes, and whether it be time, resources, or expertise, we give, share and pay things forward as one family.
- **We are interdependent.** We live our lives alongside each other and work unitedly, bringing our best everyday, in the knowledge that our colleagues have our back.
- **We are self-aware.** We know our strengths and blind spots and reflect on our own processes to evaluate, build character, and make good decisions.

We seek long-term relationships. Loyalty is important to us; as are great endings. Join us once and begin the journey.

I hereby acknowledge and accept the Role Specification of a Care Manager as outlined above

Name (please print)

Signature

Date

Signature for and on behalf of Bright Care at Home Ltd

Date