

Job Description

Department: Adults, Health & Commissioning

Division/Section: Adult Social Care Operations

Job Title: Financial Assessment Officer

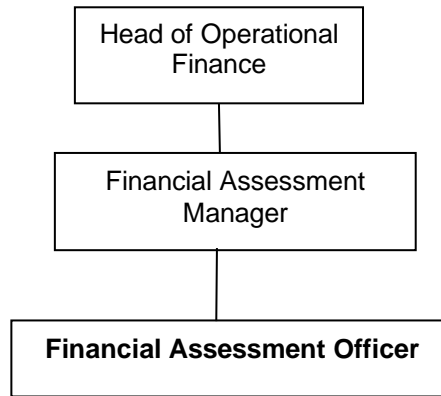
Post No: To be advised

Grade: PCC Grade 8

Reports to: Financial Assessment Manager

Organisation Chart:

Show immediate manager and any jobs reporting to this post.



DBS Check applicable? Yes - Enhanced

Is post exempt under the Rehabilitation of Offenders Act 1974 in respect of declaration of spent convictions?

Yes

Line Management responsibility for:

No. of direct reports: None

No. of indirect reports: None

Job Purpose:

To gather financial information by telephone, personal visit, postal form and digital methods from clients who require residential or non-residential care services, using this to calculate the contribution payable towards their care in accordance with statute, guidance and locally agreed charging policy. Also to advise on general welfare benefit matters and help to maximise service users' incomes by identifying potential welfare benefit entitlement and assisting with benefit claims.

Main Duties and Responsibilities:

1. Investigate, identify, verify and record the financial resources of people receiving care by telephone, personal interview, home visit, postal form or digitally with either the person receiving care or their representative.

2. Calculate the contribution payable towards the cost of care in accordance with statutory requirements, Council policy, Departmental procedures and recognised good practice - ensuring that the results of this process are communicated effectively to all affected parties.
3. Undertake reviews of financial assessments for existing care service users at appropriate times throughout the year to take account of income, benefit and legislative changes.
4. Maintain an up to date working knowledge of statutory charging regulations, particularly the Care Act 2014, and the Council's adult social care charging policy.
5. Advise people on general welfare benefit matters, helping to maximise their incomes by identifying potential welfare benefit entitlement and assisting with benefit claims and other financial issues.
6. Respond to financial assessment and other general enquiries in writing, by telephone and directly in person within prescribed timescales and in a sensitive and effective manner.
7. Provide effective support as part of the Financial Assessment team's duty rota system – responding to queries on care charging and welfare benefit matters from people receiving care, their representatives and from Council partners (by telephone and in person).
8. Co-ordinate, prepare and issue contract documentation and obtain appropriate agreement from all parties to ensure that residential placements are confirmed and appropriately documented.
9. Be receptive to comments from people receiving care relating to their care needs and any matters of concern, and be alert to the possibility of safeguarding concerns, financial abuse, and deprivation of assets – responding and reporting any concerns as appropriate.
10. Operate, maintain and update client databases and other databases used in the team in a systematic, thorough, timely and accurate manner, ensuring that the team's procedures are complied with in all aspects of the financial assessment function and at all times adhering to data protection requirements
11. Maintain effective liaison with social work practitioners, other Council departments and partners, care providers and external agencies to ensure that the Financial Assessment team's functions, and the wider Department's responsibilities are discharged professionally, sensitively and efficiently.
12. Assist with the provision of statistical data and management information in relation to the team's activities and assist with ensuring that confidential records held within the team are accurately maintained, filed appropriately and securely retained.
13. The post holder is required to comply with internal policies, procedural guidelines, legislative requirements, internal and external standards and guidance - interpreting and exercising some discretion in these areas.

Generic Responsibilities: To carry out all responsibilities with regard to the Council's Equalities Policy and Procedures and Customer Care Policy.

To comply with all Health & Safety at work requirements as laid down by the employer.

The council is committed to safeguarding and promoting the welfare of children and vulnerable adults and expects all staff and volunteers to share this commitment.

Flexibility Clause: Other duties and responsibilities express and implied which arise from the nature and character of the post within the department (or section) mentioned above or in a comparable post in any of the Organisation's other sections or departments.

Variation Clause: This is a description of the job as it is constituted at the date shown. It is the practice of this Authority to periodically examine job descriptions, update them and ensure that they relate to the job performed, or to incorporate any proposed

changes. This procedure will be conducted by the appropriate manager in consultation with the postholder.

In these circumstances it will be the aim to reach agreement on reasonable changes, but if agreement is not possible the Head of Service reserves the right to make changes to your job description following consultation.

DATE: 06/09/24

COMPLETED BY: Mark Gedney

Person Specification

JOB TITLE: Financial Assessment Officer

POST NO: TBA

GRADE: 8

DEPARTMENT: Adult Social Care

HOURS: 37

DIVISION: Adult Social Care

DIRECTOR: Stephen Taylor

DATE: Sept 2024

COMPLETED BY: Mark Gedney

ATTRIBUTES	ESSENTIAL CRITERIA	DESIRABLE CRITERIA
KNOWLEDGE	<ul style="list-style-type: none"> • Detailed knowledge of welfare benefits (A & I) (W) • Knowledge of charging for care and support (A & I) • Knowledge and understanding of general office procedures, systems and practices (A & I) 	<ul style="list-style-type: none"> • Extensive knowledge of disability benefits and welfare benefits. • Knowledge and understanding of Adult Social Care systems and familiarity with Adult Social Care practices
SKILLS & ABILITIES	<ul style="list-style-type: none"> • Ability to work as part of a team (I) • Numeracy and accuracy – especially in all forms of record keeping • Effective written and verbal communication skills – particularly to explain complex information to vulnerable service users and their families (A & I) • Ability to conduct oneself professionally in a home visit situation, handle sensitive conversations appropriately, and maintain confidentiality (I) • Ability to work under pressure, planning and prioritising own workload to meet competing demands (A & I) • Ability to collate and analyse numerical information (A & I) • Ability to understand and apply relevant legislation, regulations and procedures • Ability to use Microsoft Office applications, 	

	particularly Excel, Word and Outlook (A)	
EXPERIENCE	<ul style="list-style-type: none"> • Experience of working within a general office environment (A & I) • Experience in the use of databases, including record retrieval, inputting and updating (A & I) • Direct customer contact including advising vulnerable people and dealing with and resolving customer concerns (A & I) 	<ul style="list-style-type: none"> • Experience of working within a welfare benefits or financial assessment team
QUALIFICATIONS	<ul style="list-style-type: none"> • 5 GCSE's (or equivalent) at grade C or above including Maths and English (A & I) • Relevant experience/skills to evidence a similar level of attainment (A & I) 	<ul style="list-style-type: none"> • OCR Word Processing Level I or II or equivalent
PERSONAL CIRCUMSTANCES	<ul style="list-style-type: none"> • Ability to withstand and deal professionally with demanding, stressful and occasionally emotional meetings / home visits • Ability to work flexible hours when required 	<ul style="list-style-type: none"> • Full, clean driving licence • Suitably insured vehicle available for work
EQUALITY	<ul style="list-style-type: none"> • Candidates must demonstrate understanding of, acceptance and commitment to the principals underlying equal opportunities. (A & I) • Ability to actively support and promote Equality, Diversity and Inclusion, both in practice and within the organisation 	
CUSTOMER CARE	<ul style="list-style-type: none"> • Knowledge and understanding of effective customer care (A & I) 	

[At the end of each criteria the following codes are used to indicate how the criteria will be assessed: (AI) Application / Interview, (P) Presentation, (W) Written Test.]