

Job Description

Job Title: Financial Assessment Officer

Job number

Grade: H / Scale 5

Overall purpose of the job

To financially assess adults for social care services for both Residential and Community Care in accordance with the Care Act 2014 and Council policy and to provide financial support to vulnerable adults and their carers. To maximise the income of service users and the Council by providing advice and assistance on appropriate Welfare Benefits.

To provide an effective, customer focused support service to users of the Cambridgeshire County Council Assessment service, systems and processes. A point of contact for colleagues and service users for queries.

To ensure an integrated approach to Financial Assessments through assisting with the implementation of new technologies, methodologies and processes that meet the needs of service users, customers and client organisation.

To work alongside Social Care colleagues and vulnerable service users in a hospital setting, where significant emphasis is placed on providing expert advice in a pressured environment.

To identify and investigate potential safeguarding issues which can be conducted in difficult circumstances and environments.

Main accountabilities

Main accountabilities	
1.	Responsible for the prompt and accurate production of client financial assessments and reassessments for Adult Social Care service users ensuring that financial regulations and statutory obligations are met through home visits, postal and telephone correspondence. This includes, where appropriate, identifying and recording Service Users' Disability Related Expenditure and seeking advice about such expenditure from Adult Social Care Team Managers and also investigating property issues and establishing eligibility for Deferred Payment Applications.
2.	To maximise the service users and Council's income through advice and assistance, identifying customer benefits and assisting the service user with these claims.
3.	Investigate, respond to and resolve service requests and queries ensuring operational service priorities are met through ownership, adhering to agreed service standards, legislation and guidance and according to operational procedures. Escalate any complaints and potential safeguarding issues in accordance with the relevant procedures.
4.	Take responsibility and ownership on areas of the service where improvements could be made. Recognising and adapting to the changing needs of the service by making recommendations

	and implementing agreed changes to improve efficiency and the service provided
5.	Support system implementations including conducting system testing and delivering training to staff on new system processes.
6.	Work as part a team supporting your colleagues, mentoring Apprentices and Assistants to a high standard. Provide training to new Financial Assessment Officers as and when required to ensure high levels of standards are met.
7.	Work collaboratively on projects that support developments and improvements for the Financial Assessments service in a professional and positive way.
8.	Manage own workload, processing high quality information / data accurately and in a timely manner, ensuring that case notes are made and recorded to a high standard.
9.	Embed customer service excellence within the team through contributing to the design of customer focussed processes, active participation in one-to-one meetings / the PADP process and own behaviours.

Safeguarding commitment *(Include for roles involving work with children/vulnerable adults)* We are committed to safeguarding and promoting the welfare of children and young people/vulnerable adults. We require you to understand and demonstrate this commitment.

This job description reflects the major tasks to be carried out by the post holder and identifies a level of responsibility at which they will be required to work. In the interests of effective working, the major tasks may be reviewed from time to time to reflect changing needs and circumstances. Such reviews and any consequential changes will be carried out in consultation with the post holder.

Person Specification

Qualifications, knowledge, skills and experience

Minimum level of qualifications required for this job

Qualifications Required	Subject	Essential/ Desirable
Educated to GCSE level, NVQ Level 2 or experience gained in a similar or related working environment	Business & Administration or Finance	Essential
Full Driving Licence		Essential

Minimum levels of knowledge, skills and experience required for this job

Identify	Describe	Essential/ Desirable
Knowledge		
Knowledge of the Care Act 2014 and Welfare Benefit legislation		Desirable
Excellent IT skills with good knowledge of Microsoft Office applications		Essential
Skills		
High level of numeracy and literacy. Ability to write clear and concise reports		Essential
Ability to work with internal and external stakeholders, in particular vulnerable adults and their carers, to support the delivery of the Financial Assessments service in line with the annual service plan		Essential
Ability to communicate effectively both verbally (face to face and by telephone) and in writing, in particular with vulnerable adults and their carers, in order to achieve desired outcomes. Be able to influence and negotiate when advising and supporting customers and service users		Essential
Ability to understand and interpret national legislation, policies and guidance and to ensure processes remain compliant with national requirements		Essential

Ability to process data and financial information related to the Financial Assessments Service to support the production of management reports		Essential
Ability to motivate and mentor Apprentices and Assistants to provide staff development.		Desirable
Ability to travel to visit service users where appropriate		Essential
Experience		
Experience of working independently scheduling and prioritising own work to meet service requirements	Significant experience of managing and prioritising work, preferably in a similar environment	Essential
Proven customer service background with experience of conflict resolution, negotiation and diplomacy skills	Significant experience of dealing with difficult customers and conflict resolution	Essential
Experience of working in a customer focused role in a fast paced environment	Significant experience in a customer service environment	Essential
Safeguarding (include for roles working with children/vulnerable adults)	Demonstrate an understanding of the safe working practices that apply to this role.	
	Ability to work in a way that promotes the safety and well-being of young people/vulnerable adults.	Essential

Disclosure level

What disclosure level is required for this post?	None	Standard
	Enhanced	Enhanced with barred list checks

Work type

What work type does this role fit into? (tick one box that reflects the main work type, the default workers type is flexible)	Fixed	Flexible	Field	Home
---	-------	----------	-------	------