



**Job Description**

Job Title: Financial Assessment Officer

Grade: H

**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 carer's. To maximise the income of customers and the Council by providing advice and assistance on appropriate Welfare Benefits.

To provide an effective, customer focused support service to users of the Financial Assessment service, systems and processes. A point of contact for colleagues and customers 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 customers, customers and client organisation.

To work alongside Social Care colleagues and vulnerable customers where significant emphasis is placed on providing expert advice in respect of the Financial Assessment. To identify and investigate potential safeguarding issues which can be conducted in difficult circumstances and environments.

**Main accountabilities**

<b>Main accountabilities</b>	
1	Responsible for the prompt and accurate production of customer financial assessments and reassessments for Adult Social Care customers (both residential and domiciliary) in accordance with the Care Act 2014, the Care and Support Statutory Guidance and Council policy. In undertaking the assessments, provide support to customers and their carers. ensuring that both financial regulations and statutory obligations are met, undertaking home visits, responding professionally to both postal and telephone correspondence, as appropriate. This includes, where appropriate, identifying and recording Customers' Disability Related Expenditure, seeking advice about such expenditure from Adult Social Care Team Managers and investigating property issues and establishing customer eligibility for Deferred Payment Applications.
	To maximise the customers and Council's income through advice and assistance, identifying customer benefits and assisting the customer and their carer's with these claims.
	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.
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.	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. Work collaboratively on projects that support developments and improvements for the Financial Assessments service in a professional and positive way.
9.	Manage and prioritise 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, records are maintained and retained in accordance with Data Protection legislation.
10.	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.
12.	To carry any other duties that fall within the broad spirit, scope and purpose of this job description and which are commensurate with the grade of the post.
13.	To demonstrate awareness/understanding of equal opportunities and other people's behavioural, physical, social and welfare needs.

**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.

## 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		Desirable

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

Identify	Describe	Essential/ Desirable
<b>Knowledge</b>		
Understanding of adult social care processes, including financial processes.	Some working experience	Essential
Knowledge of the Care Act 2014 and Welfare Benefit legislation		Desirable
Excellent IT skills with good knowledge of Microsoft Office applications		Essential
<b>Skills</b>		
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 effectively 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
<b>Safeguarding</b>	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 children and young people/vulnerable adults.	Essential
<b>Equal opportunities</b>	Ability to demonstrate awareness/understanding of equal opportunities and other people's behaviour, physical, social and welfare needs	Essential

<b>Disclosure level required for this post</b>	Enhanced
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<b>What work type does this role fit into?</b> (tick one box that reflects the main work type, the default workers type is flexible)	Flexible
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