

WHERE  
CAREERS  
THRIVE

When potential  
is unlocked,  
talent *thrives*



West  
Northamptonshire  
Council

Job description and person specification

## Financial Assessment Officer

Finance Operations, Commissioning and Performance

Thank you for your interest in this role. Our vision at West Northamptonshire Council (WNC) is: 'to make West Northants a great place to live, work, visit and thrive'.

We truly stand by this and work hard every day to make this a reality, and at WNC it's about our people. People who thrive with ambition, bring new ideas, demand better ways of working, care about every detail, and who never shy away from a challenge.

Our culture is a gateway for new experiences. A place to forge new opportunities. To empower you in your career and unite you with like-minded people. When potential is unlocked, talent thrives.



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## **Purpose and impact:**

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 Financial 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.

## **Accountable to:**

This role is accountable to the Financial Assessment Team Leader and Client Funds Manager. The role sits within Finance Operations Service, part of the Commissioning and Performance Directorate in West Northamptonshire Council.

## **Responsibilities:**

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.** 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:

The requirements for the role are outlined below and will be part of the selection process. Each of the criteria listed below will be measured by:

(**A**) Application Form, (**T**) Test, (**I**) Interview, (**P**) Presentation, (**D**) Documentation.

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

Skills and abilities:	Essential / Desirable	Measured by
Demonstrate a high level of numeracy and literacy. Demonstrate the ability to write clear and concise reports	Essential	A, I
Demonstrate the 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	A, I
Demonstrate the ability to communicate effectively both verbally (face to face and by telephone) and in writing, in particular with vulnerable adults and their carers, to achieve desired outcomes. Be able to influence and negotiate when advising and supporting customers and service users	Essential	A, I
Demonstrate the ability to understand and interpret national legislation, policies, and guidance and to ensure processes remain compliant with national requirements	Essential	A, I
Demonstrate the ability to process data and financial information related to the Financial Assessments Service to support the production of management reports	Essential	A, I
Demonstrate the ability to motivate and mentor Apprentices and Assistants to provide staff development.	Desirable	A, I
Demonstrate the ability to travel to visit service users where appropriate	Essential	A, I
Demonstrate effective use of Office 365 (incl. Teams, OneDrive, etc.) or willingness to undertake training during the probation period.	Essential	A, I

Knowledge:	Essential / Desirable	Measured by
Demonstrate a Knowledge of the Care Act 2014 and Welfare Benefit legislation	Desirable	A, I

Relevant experience:	Essential / Desirable	Measured by
Demonstrate experience of working independently scheduling and prioritising own work to meet service requirements	Essential	A, I
Demonstrate a proven customer service background with experience of conflict resolution, negotiation, and diplomacy skills	Essential	A, I
Demonstrate experience of working in a customer focused role and in a fast-paced environment.	Essential	A, I
<b>Safeguarding.</b> Demonstrate an understanding of the safe working practices that apply to this role. Demonstrate the ability to work in a way that promotes the safety and well-being of children and young people/vulnerable adults.	Essential	A, I

Education, training, and work qualifications:	Essential / Desirable	Measured by
Educated to GCSE level, NVQ Level 2 or experience gained in similar or related working environment	Essential	A, I, D
Full Driving Licence	Essential	A, D

All appointments are subject to standard pre-employment screening. This will include identity, references, proof of right to work in the UK, medical clearance, and verification of certificates.

**Additional pre-employment checks specific to this role include**

Enhanced Disclosure and Barring Service check.

## Day-to-day in the role:

<b>Hours:</b>	37	<b>Primary work base:</b>	One Angel Square
<b>Job family band:</b>	RT05	<b>Worker type:</b>	Flexible
<b>Salary range:</b>	£30,560 - £21,212		

### Working conditions & how we work:

This role has been identified as a part-flexible worker type, this means that you will be able to work from other work locations and when not working from an office you will be working remotely for up to 3 days a week (including from home) once full training has been provided.

## Our organisational values and behaviours

Everything we want to achieve for West Northants depends on having the right people in place and doing the right things and we want all colleagues to THRIVE, both personally and professionally. Our values and our behaviours framework underpin how we work and what partners and customers can expect from us. We want to do our very best for our residents, service users and businesses and for our staff – we want everyone to THRIVE.

<b>T</b> Trust	We are honest, fair, transparent, and accountable. We can be trusted to do what we say we will.
<b>H</b> High Performing	we get the basics right and what we do, we do well. We manage our business efficiently.
<b>R</b> Respect	we respect each other and our customers in a diverse, professional, and supportive environment.
<b>I</b> Innovate	we encourage curiosity, we are creative and seize opportunities to grow individually as an organisation and as an area.
<b>V</b> Value	We continually strive for best practice and ways of improving existing procedures, practices and systems and thereby promoting efficiency and cost effectiveness
<b>E</b> Empower	we believe in people, will listen, learn and trust them to make decisions. We help people to realise their ambitions.

**“Valuing colleagues as individuals and encompassing our different perspectives to deliver our collective ambitions. One West inclusive culture”**

# When potential is unlocked, talent *thrives*

Choose a career that offers you a true sense of achievement, fills you with pride and challenges you in a positive way, everyday.

## The benefits of a career at WNC include:

- **People** are at the centre of everything we do. Without our people, we wouldn't be able to deliver services to the people in our community.
- **Ambition** runs through everything we do at West Northants Council, we nurture and develop our people's ambition and willingness to succeed, to continually improve the service we provide to the community.
- **Care** is at the heart of West Northants Council, we care in so many ways; seen and unseen, helping our colleagues and community to thrive.
- **Flexibility** is key, we know work-life balance is critical to wellbeing, so we work hard to make sure our benefits package promotes and improves wellbeing; from annual leave, sick pay, family leave and flexible working, financial security offered by a local government pension scheme and life assurance, and discount schemes which make a difference to your day-to-day life, through to employee helplines offering free legal, health, financial and wellbeing advice and support.

We want you to have balance and be happy.

