



## Role Profile

<b>Job Title:</b> Financial Assessment Officer	<b>Grade/ Level:</b> M1	<b>Post Number:</b> P/A
<b>Directorate:</b> Finance	<b>Job Family:</b>	<b>Date Prepared:</b> July 2020

**Role reports to (Job Title):**  
Team Manager Financial Assessments

**Job Purpose:**

To be part of the Financial Assessment and Benefit (FAB) Team, undertaking assessments and reviews of income for both Domestic and Residential Adult Social Care users, Special Guardians, Adopters and Carers of children under Child Arrangement Orders.

To ensure that clients are in receipt of the correct benefit entitlements to maximize their income.

To calculate the correct contribution care users are required to pay towards the cost of their care in line with the Care Act 2014.

Manage and review deferred payment agreements to ensure the relevant security is in place and regular invoices are issued.

Calculate the correct allowance entitlement in respect of Special Guardians, Child Arrangement Orders and Adoptions.

Communicating with individual clients, or their financial representative, by telephone, letter, email and face to face.

Managing own caseload, collating statistics, run and action reports.

**Key accountabilities**

**General accountabilities cover, but are not limited to, the following:**

- To gain a working knowledge of the Care Act 2014, Special Guardianship Regulations 2005 and the Adoption Allowance Regulations 1991
- To gain an understanding of State Benefit to enable you to ensure clients are in receipt of their correct entitlements and to maximise their income
- To keep up to date with future changes of legislation
- To consider financial declarations to calculate the correct weekly contributions being charged in respect of social care clients and to conduct assessment reviews
- To process applications and reviews of payments for Special Guardianship Orders, Child

### Arrangement Orders and Adoption Allowances

- To correspond with customers via email, letter, telephone and face to face where necessary to gather required information or to answer enquiries to ensure the accurate and timely completion of financial assessments
- To use excellent questioning and listening skills, asking pertinent questions to establish facts in order to gain a full understanding of the customer's financial situation
- To liaise with social work teams, and other Departments as necessary, to ensure: all required information is available, decisions are made and queries are resolved in a timely manner
- To promote self-serve options
- To assist with the collation of statistical information relating to increased/decreased income as a result of the assessments undertaken, which may involve creating spreadsheets and running system reports
- To be able to conduct a manual calculation of assessed client contributions or allowances, where necessary, in addition to using the relevant IT systems
- To progress assessments in a timely manner in line with Local Policy and Procedures
- To refer unresolved actions to the Team Manager
- To adhere to GDPR and understand Information Security

### Supplementary Accountabilities:

- Production of documents, letters and spreadsheets
- General office administration duties
- Engagement in continuous improvement
- Undertake any other duties that can be accommodated within the grading of this post

**Job Scope:** Number and type of jobs managed:  
None

**Typical tasks supervised/allocated to others:**  
None

**Job Scope:** None

**Budget:** None

**Assets:** None

### Knowledge and Experience:

- Good level of Literacy and Numeracy skills – minimum of 4 GCSE's including Maths and English at grade C or above, or equivalent

- Knowledge of The Care Act 2014, Special Guardianship Statutory Guidance, Special Guardianship Regulations 2005 and the Adoption Allowance Regulations 1991 and State Benefit entitlements is desirable
- Experience of using Microsoft Packages, including Word, Excel, Powerpoint, and Outlook
- Confidence to learn and use specialist ICT packages
- Ability to communicate with others; written, face to face, telephone, Teams
- Ability to be confidential and cope with hearing or writing about highly sensitive and emotional events relating to adults and families
- Ability to communicate effectively with vulnerable people
- Good interpersonal skills
- Ability to work as part of a team
- Ability to be flexible and adaptable
- Good time keeping and organisational skills
- Work experience/work placements where dealing with people and finance would be an advantage
- Ability to deal with cases maintaining confidentiality, tact and diplomacy
- Ability to work on own initiative
- A confident approach to dealing with clients and colleagues

**Decision Making:**

- Ability to make decisions of a financial nature
- Ability to prioritise own workload to ensure all tasks are completed within the given time frames

**Contacts and Relationships:**

- Daily contacts with line manager/mentor and other members of the wider team, other Council Departments

**Creativity and Innovation:**

- Have the ability to identify and make suggestions on how any improvement in the way the department operates
- Some creativity and innovation in the day to day running of the office, identifying new methods of work
- Engagement in continuous improvement

**Job Specific Competencies:**

- Good communication skills – both written and verbal
- Good interpersonal skills

- Be willing to work as part of a wider team to ensure the success of the whole department
- Be flexible in approach to work and adaptable to change
- Discreet and professional in approach to customers, peers and others
- Professional approach and presentable in appearance

**Values and Behaviours**

We strive to underpin our culture of being ‘At our Best’ through strong management and authentic leadership. This means getting the management basics right. We own and demonstrate accountability, both individually and collectively, and aim to get things right first time. Building on this we also expect everyone at SBC to demonstrate and live our organisational values and behaviours, by displaying:

- Accountability at all levels
- Customer care and pride in what we do
- Continuous learning and evaluation
- Valuing one another and the contribution each of us makes

**Data Protection:**

In accordance with the provisions of the Data Protection Act, jobholders should take reasonable care to ensure that personal data is not disclosed outside Council procedures, or use personal data held on others for their own purposes. In accordance with the provisions of the Freedom of Information Act 2000, ensure requests for non-personal information are dealt with in accordance with the Council’s written procedures.

**Employee Signature:**

**Print Name:**

**Date**

**Line Manager’s Signature**

**Print Name:**

**Date:**