



Role Profile

Job Title: Financial Assessment Officer	Role Profile Number: SBC_10879
Grade: 6 Salary:	Date Prepared: July 2020
Directorate/Group: Finance	Reporting to: Team Manager Financial Assessments
Structure Chart attached:	No

Job Purpose

- As 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.

Key Accountabilities

- 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

Knowledge & Experience

Candidates must have substantial knowledge and experience in the following areas of business and will be required to provide evidence of this:

- Good level of Literacy and Numeracy skills – minimum of 4 GCSE's including Math's 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
- Good communication skills; 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 to ensure the success of the whole department
- 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 and professional approach to dealing with clients and colleagues

Qualifications

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

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

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

<u>Job Scope</u> Number and types of jobs managed <ul style="list-style-type: none">• Caseload of financial assessments Typical tasks supervised/allocated to others <ul style="list-style-type: none">• none	Budget Holder Responsibility Asset Responsibility:	No Laptop and mobile phone
--	---	---

Contacts and Relationships

(how the role relates to the work of others i.e. officers, groups, committees, general public, members, partner organisations, internal and external contacts of the council)

- Daily contacts with line manager/mentor and other members of the wider team, other Council Departments
- Daily contact with ASC client or their representatives in order to resolve queries regarding the accurate completion of the financial assessment.

Other Key Features of the role

- Ability to manage in a professional and helpful manner clients or their representative who may be angry, aggressive, upset or confused.

Employee Signature:	Print Name:
Date:	
Line Managers Signature:	Print Name:
Date:	