

Entitlement & Assessment Officer (Financial Assessments & Benefits - Adult Social Care)

Job Description / Person Specification

Contents:

[Job Description](#)

[Person Specification](#)



www.reading.gov.uk



Reading
Borough Council
Working better with you

Job Description

Job Title Entitlement & Assessment Officer (Financial Assessments & Benefits - Adult Social Care)

Location Civic Offices

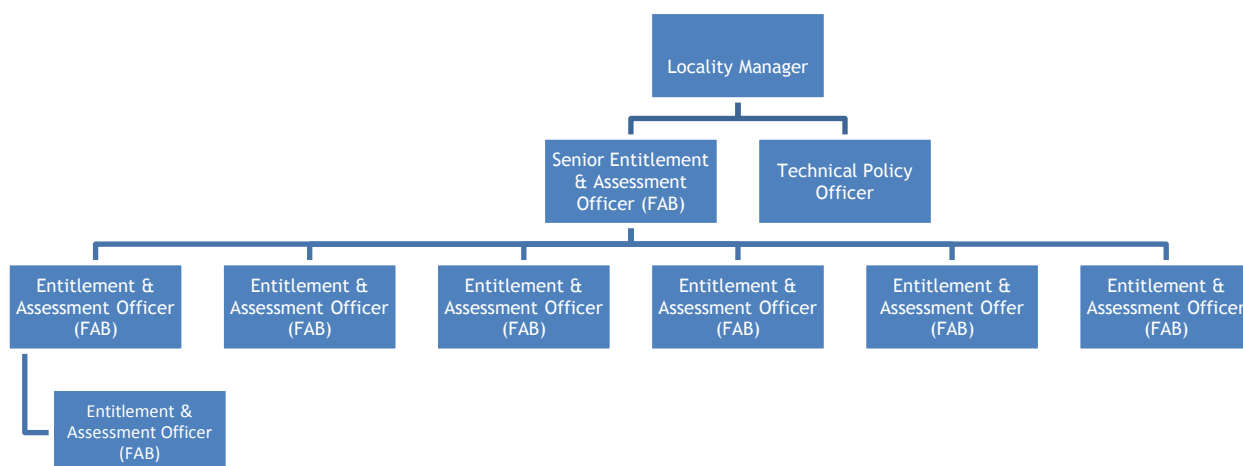
Grade/Salary Range RG4/RG5 (scp 11-28)

Service/Directorate Adult Social Care and Health Service

Job Purpose

1. To work within a team of staff within the Entitlement and Assessment section so that they deliver an integrated high quality customer focussed service across a number of access channels (face to face; telephone; email; web; SMS).
2. To work as part of a team of Entitlement and Assessment Officers on a range of cases ensuring that Entitlement and Assessments are dealt with promptly and correctly by applying a thorough understanding of the relevant legislation and procedures across all areas of the functions.
3. To actively maintain and develop a thorough and up -to-date working knowledge of legislation, procedures and guidance that affects their service area(s) and work collaboratively with Council colleagues to improve service delivery and integration.
4. To respond to all customer contacts received across a variety of channels in a consistent, positive and efficient manner & resolve as many at first point of contact.
5. To project a positive image of the Council to customers in accordance with the Councils Customer Care Charter.
6. To process cases to the required Customer Service and Performance Standards (including statutory) complying with the Data Protection Act, the Freedom of Information Act and the Council's requirements on confidentiality.
7. Provides advice and signposting to residents and customers on all aspects of service provision within the Adult Social Care and Health Service.

Designation of Post and Position within Departmental Structure



1. The Entitlement and Assessment Officer will work within the Entitlement and Assessment function within the Adult Social Care and Health Service reporting to the Senior Entitlement and Assessment Team Officer.

Main Duties and Responsibilities

Staff Management

1. No staff management will be required of the Entitlement and Assessment Officer.

Service Provision

2. To work as part of a team of Entitlement and Assessment Officers in managing a caseload of complex and difficult cases, ensuring that Entitlement and Assessments are dealt with promptly and correctly by applying a thorough understanding of the relevant legislation and procedure.
3. To actively maintain and develop a thorough and up -to-date working knowledge of legislation, procedures and guidance that affects their service area(s) and work collaboratively with Council colleagues to improve service delivery and integration.
4. To respond to customers (internal and external) across a variety of channels and services on behalf of the Council in accordance with service level agreement in a

consistent, positive and efficient manner & resolve as many issues as possible at first point of contact.

5. To recognise the diversity of Reading's residents and customers and to ensure appropriate responses are given (including making appropriate arrangements for those with different language, disability or health needs).
6. To resolve customer's issues based on a thorough knowledge of relevant policies and procedures.
7. To respond to customer contacts and issues across a variety of channels which are dealt with using current policy and procedure and to agreed timescales. Recording these using the agreed IT systems to enable accurate tracking.
8. To prove willingness to proactively identify service improvements, making recommendations to improve overall service delivery and customer service or working practices with knowledge of legislative requirements, quality assurance objectives and good practice. This may include contributing to development of IT systems to support improvements.
9. To work jointly with other Council departments, internal and external agencies on cases to deliver a joined up service to meet the needs of the resident and customers.

Management of Budgets

10. No budget management will be required of the Entitlement and Assessment Officer.

General

11. To adhere to the Adult Social Care and Health compliance to the Council's policies and procedures.
12. To work flexibly anywhere within Adult Social Care and Health as required.

Scope of Job (Budgetary/Resource Control/Impact)

1. N/A

Special/Other Requirements/Responsibilities of this Post

<i>Level of DBS check required for this post</i>	Standard
<i>Does the post require a check against the list of people barred from working with vulnerable adults?</i>	NO
<i>Does the post require a check against the list of people barred from working with children?</i>	NO
<i>What other security/safer recruitment clearances are required for this post? (excluding standard identity/work permit/education qualification checks)</i>	N/A
<i>Is this post “politically restricted”?</i>	NO
<i>Responsibility for Health & Safety:</i>	LEVEL 1
<i>Please specify responsibility for implementing the Council’s risk management strategy as it applies to the service, ensuring risks to service delivery and specific projects or initiatives are recognised and that actions are taken and monitored to mitigate risks identified</i>	N/A
<i>Please specify any other Statutory Duties and/or responsibilities of this post not already covered in the “Main Duties & Responsibilities” above</i>	<ol style="list-style-type: none"> 1. Able to attend evening meeting when necessary 2. Ensure ready to take first call, visitor, email, work item etc at the start of their agreed hours/ rota as appropriate 3. Able to represent the Council at external events (inside and outside of the borough)

Person Specification

Qualifications/Education/Training

1. Good general level of education. GCSE or equivalent in English (C or above) and Maths (B or above), or equivalent demonstrable experience (with training relevant to entitlement services operations).
2. Evidence of a thorough knowledge of entitlements and assessment functions including but not limited to social care charging or equivalent operational experience.
3. Experience of using office equipment such as telephone and PC based applications in the administration of entitlement and assessment services (e.g. Mosaic, Advantage/Academy, Info@work or equivalent EDMS systems, Word and Excel).

Experience

1. Experience of working within an Entitlement and Assessment environment
2. Experience of working within a team providing a service to the public
3. Experience of implementation of policy, procedures and quality of service
4. Experience of building effective partnerships both internally and externally.
5. Experience of dealing with customer contacts where it is not always possible to meet customer needs/wishes
6. Experience of using computer packages in order to extract and analyse information
7. Experience of working in an environment where you can manage your own workload
8. Experience of working in a multi-disciplinary environment and of team working
9. Experience of working with elected members
10. Experience of making decisions in complex, but rule-bounded environments

Skills, Abilities & Competencies

1. Ability to identify quickly the relevant issues and problems within complex situations and prioritise actions accordingly
2. Ability to interpret, understand and communicate complex advice on legal and/or financial issues in an understandable way to staff members and to Customers

3. Ability to produce reports, both statistical and textually
4. Ability to manage a caseload and maintain accurate records within defined standards as well as providing advice on complex issues to team
5. Clear written and oral communication skills
6. Strong interpersonal skills
7. Computer literate with the ability to use spreadsheets and word processing packages
8. Ability to demonstrate an understanding of equal opportunities and why it is important in terms of staff and service delivery
9. Excellent team working skills
10. Well-developed organisational skills
11. High degree of self-motivation and initiative
12. Commitment to training and development
13. Commitment to and enthusiasm for the future success of the Adult Social Care and Health Service and the delivery of a quality service

Appendix of Duties & Responsibilities

RG4 Below the gateway (11 - 17):

1. To provide a high quality financial assessment and benefits advice service to Adult Social Care service users in receipt of chargeable services, and their families/carers
2. To contact Adult Social Care service users and their representatives (by telephone or face-to-face meeting) within agreed target times to explain Adult Social Care charging policies and to obtain, record, review, verify, collate and evaluate financial information for financial assessment(s)
3. To set up, monitor and update Adult Social Care Service users' financial records and ensure that claimed benefits are inputted within target times
4. To act as a point of contact for issues to do with financial assessment(s) of Adult Social Care charges
5. To supply charge financial assessment(s) outcome information to internal colleagues to enable accurate billing and support Adult Social Care processes

6. To supply management information to the Senior as appropriate for monitoring purposes and to other internal colleagues for the purpose of budget monitoring

RG4 Above the gateway (18 - 21):

1. To calculate financial assessment(s) of charges under the relevant Adult Social Care charging policies and notify outcomes of financial assessment(s) to Adult Social Care service users within agreed timescales to meet team targets
2. To carry out welfare benefits checks and provide relevant accurate welfare benefits advice and arrange assistance with benefit applications (where appropriate), having regard for any joint working arrangements agreed with the Department for Work and Pensions
3. To follow up welfare benefit applications submitted to ensure appropriate outcomes and take any remedial action (such as advocating for service users) or referring service users to other agencies, as appropriate
4. Keep up to date with legislative and policy changes that may affect charging and welfare benefits
5. Where carrying out financial assessments for Care Homes , to arrange for the billing of Adult Social Care Service users in accordance with the Care Act 2014 and Council Policy
6. To provide explanations and support to Adult Social Care colleagues around social care charging policies
7. To liaise with the Council's Accounts Receivable team as appropriate to limit the build-up of high-risk debt in relation to care home and non-residential charging
8. To liaise with the Council's Legal team to seek advice on complex legal issues relating to financial assessment(s), where appropriate, and to ensure any Deferred Payment Agreement(s) are properly processed
9. To carry out assessments for Third Party Top Ups and First Party Top Ups in relation to the Council's Choice of Accommodation and Additional Payments Policy regarding care home placements
10. To contribute to the updating and development of the Council's public information about Adult Social Care financial assessments
11. To disseminate good practice in relation to the achievement of targets and performance. To participate actively in determining the development of the financial assessment and benefits service in relation to changes in working practice to achieve efficiency, customer focus and value for money

12. Assist in the induction of Adult Social Care colleagues so that they have a broad understanding of the current Care and Support Charging and Financial Assessment Framework charging policy and the welfare benefits available

RG5 Below the gateway (22 - 25):

1. To visit Adult Social Care service users or their representative(s) in their homes to obtain, record, review, verify, collate and evaluate financial information to calculate Adult Social Care charges and explain charging policies
2. To carry out welfare benefits checks, provide relevant accurate welfare benefits advice and assist with benefit applications (where appropriate), in accordance with the Department for Work and Pensions (DWP) standards*, including visits to adult social care service users or their representative(s) in their homes where appropriate. (*It is anticipated that the postholder will undertake training from DWP to become accredited by DWP to verify information and complete relevant DWP reports in respect of DWP welfare benefits applications)
3. To regularly carry out all aspects of the financial assessment work and welfare benefits work of the team for non-residential and care home Adult Social Care charging meet team deadlines and targets, having evidenced this through appropriate appraisal and 1:1's, training and performance standards

RG5 Above the gateway (26 - 28):

4. To be able to demonstrate the delivery of legislation, policies and procedures of more than one discipline from the services delivered by the Entitlement and Assessment team (e.g. administering benefits and carrying out invoicing) on a regular basis, having evidenced this through appropriate appraisal and 1:1's, training and performance standards.