

JOB FAMILIES ~ Technical

Job Title – Financial Assessments & Benefits Officer

Level descriptor JG5

Role purpose:

To deliver to Service Users an efficient and effective Income Assessment, Welfare Benefit, Deferred Payment and Financial Assessment Service across the full range of Care provisions, including Adult Social Care and Family Law cases such as Adoption and Special Guardianship Orders. Using skills gained through academic or professional qualifications and practical experience. Roles at this level may work unsupervised within defined procedures but with advice from managers.

Typical activities

To ensure public money is spent appropriately, and charges are implemented to maximise income to the Council. Collect, collate and verify information required for local authority assessment purposes, including Housing & Council Tax Benefit, including interviewing service users, relatives, care managers and when appropriate solicitors and other service user representatives. Ensure all assessments are calculated in accordance with the current charging legislation and the Authority's policies

Meet service users and/or their representatives in their own homes, hospital or other suitable location or process user submitted financial assessments ensuring that all relevant paperwork is completed in full. Ensure all clients are efficiently and accurately financially assessed for services provided (Including Adoption Allowances), in accordance with approved assessment scales and agree disbursements using delegated Authority.

Provide, gather and verify information effectively using a variety of communication techniques during interviews with service users/representatives, asking questions to identify possible entitlements to complementary benefits

Deliver an efficient and effective provision of a comprehensive welfare benefits services protecting and promoting the financial interests of clients, including the application for relevant benefits to maximise income for the council.

Verify with the service user or their representative their benefits, income, outgoings and capital (savings, investments and property) and check for any possible indication of deprivation of capital or assets.

Ensure that appropriate records are maintained ensuring regular and timely reviews of charges for all financially assessed services are conducted. Ensure that discretionary provisions in regulations are operated responsibly and that all income, including Deferred Property Charges and Interest, due to the Local Authority is promptly collected in accordance with legislation and statutory regulations.

Provide technical support for complex cases to develop and support colleagues in providing professional consultation, direction and support on financial assessments and benefits and be a role model for best practice.

Knowledge, skills & experience

NVQ level 2 literacy & numeracy or equivalent

NVQ level 3 or 4 qualifications or equivalent to demonstrate technically specific skills relating to the appropriate area of work. Additional modular vocational units or other technical qualifications specific to particular areas of the service

Practical work experience to give thorough understanding of the processes and practices required to deliver the service.

Knowledge of Retirement Pensions, Attendance Allowance, Disability Living Allowance, Pension Credit, Incapacity Benefit, Severe Disablement Allowance, Carers' Allowance, Appointee Action, Bereavement Benefits etc. and the process for claiming / ceasing those benefits.

Awareness and a sound understanding of the service area technical protocols, regulations and relevant legislation

Awareness and understanding of Disabilities and Mental Health and the impact of these on service user's daily lives

Ability to make analytical reasoning and recommendations about particular areas of work.

Ability to engage with other stakeholders, the general public, vulnerable Service Users and their representatives.

To ensure compliance with all Health and Safety legislation and associated codes of practice and authority policies.

Ability to present evidence and information clearly and confidently in a variety of formats

<p>Ensure that Financial Assessments are reviewed regularly in accordance with guidance and to review specified annual charges (under delegated authority) to implement standard charges approved by committee.</p> <p>Communicate effectively with partners and colleagues, both verbally and in writing through the appropriate use of case notes and other record keeping within information sharing protocols and record keeping policies.</p> <p>Provide information and advice to others on a range of subjects within a specific area of work to ensure compliance with and understanding of accepted service or standards.</p> <p>Apply knowledge and skills to a range of activities demonstrating understanding of the technical service area, relevant procedures, legislation and guidelines.</p> <p>Analyse and interpret data and information and make recommendations to support decision making by others for particular activities or services.</p> <p>Contribute to developments in services and implement agreed changes to improve service delivery.</p> <p>Preparation of statements and documents and collection / collation of evidence from others in preparation of Financial Assessments.</p>	<p>Ability to work without close supervision and recognise professional boundaries to seek advice when appropriate.</p>
<p>Performance measures</p>	<p>Competencies</p>
<p>Quantifiable objectives ~ e.g.</p> <ul style="list-style-type: none"> • Complete all Residential financial assessments within 5 working days of receipt of completed application • Complete non-residential assessments at the visit. • Ensure diarised cases are reviewed regularly and action taken within the prescribed time limits • Ensure the Deferred Payment System is effectively used for property cases • Maximise income for the Local Authority – Currently £16m per annum (Highest in UK) • Maximise Benefit take up through persistent referral for relevant benefits - currently £1m per annum • Notional Capital and deprivation cases to be included whenever deprivation occurs – Currently £52k per annum • Deceased service users to be actioned and notified of fees within 21 days of death • Re-assessments of care charges to be completed within 5 working days • To arrive at 90% of visits within the prescribed time window • number of cases held at any one time, impact evaluation of service delivery, quality of records, etc • Feedback from service users, colleagues and partner agencies • Key Performance Indicators (where available) • Line manager assessment • 360 feedback from staff and colleagues 	<p><u>Team Working</u> ~ cooperation and flexibility, follows principles of integrated working, actively shares information and best practice</p> <p><u>Service user/ outcome focused</u> ~ achievement of results/targets through appropriate interventions/activities etc. Clear understanding of disability issues and the effect this has on people's daily lives</p> <p><u>Problem solving & judgement</u> ~ makes links between identified potential issues and possible solutions, seeks advice from others, application of technical knowledge to problems</p> <p><u>Planning & Organising</u> ~ Ability to work unsupervised. Prioritises own work, organising work for self to meet agreed deadlines</p> <p><u>Business Awareness</u> ~ Demonstrates an understanding of what it takes to be successful within own work area and the contribution of the role to the area of work</p>

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| <ul style="list-style-type: none">• Performance of the team• Line manager assessment | |
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Equality and Diversity

We expect all employees to act professionally and to treat colleagues and the public with dignity and respect. This means setting a strong personal example of good equality and diversity practice at all times and ensuring they are sensitive to the needs and views of others and reflect this in the way they behave. Managers have additional responsibilities of managing others effectively by recognising and valuing each team member as an individual and always challenging inappropriate language and behaviour.

Health and Safety

We all have a responsibility to work within health and safety legislation, associated codes of practice, North Somerset Council's policies and procedures and our local safe systems of work and emergency arrangements.

Continuous Development

Our jobs and the way we do things evolve over time and we need to keep abreast of new technologies, legislation and methodologies for our own subject areas. We are responsible for reviewing and developing our own professional practice.