

SEFTON COUNCIL

JOB DESCRIPTION

Department: Adult Social Care.
Division: Service Development & Support.
Post: Financial Assessment Officer
Grade: Grade G
Location: Merton House

Responsible to: Senior Financial Assessment Officer.

JOB PURPOSE

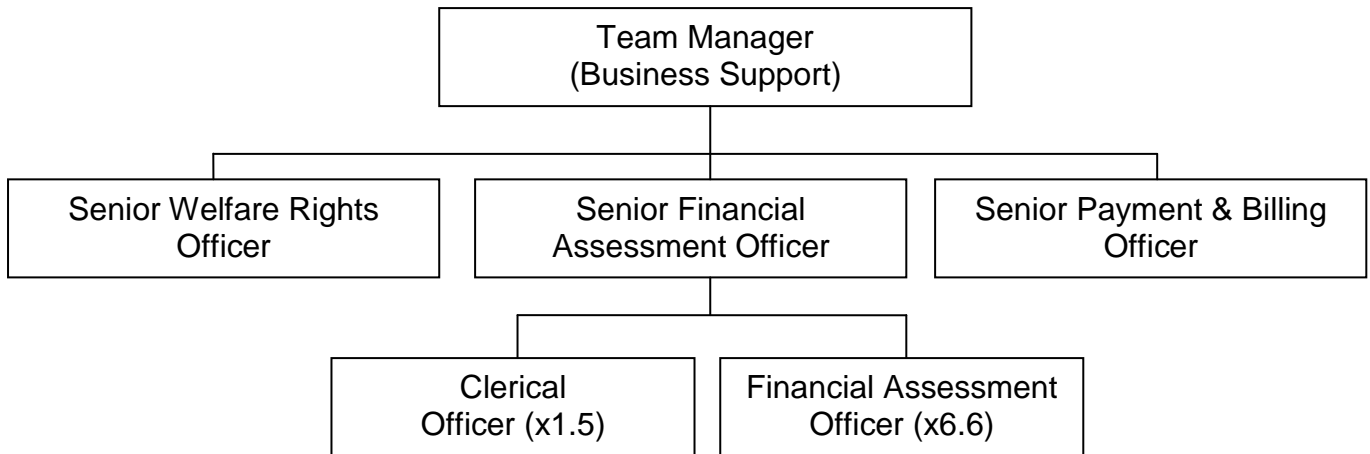
The role will primarily be one of undertaking Adult Social Care Financial Assessments (relative to residential and non-residential services), whilst providing Welfare Advice to maximise income for the client and potential income recovery to the Council.

MAIN DUTIES

1. Undertake financial assessments and re-assessments in a timely and accurate manner, as directed by the Senior Officer or Team Manager. Apply national guidance and local policy in assessment, to ascertain if a client can contribute to their care and support. Visit the homes of clients as necessary and have due regard to the individual client circumstances and the environment in which the assessment needs to be undertaken.
2. Use the Council's 'ContrOCC; system for recording information, calculating client contributions, generating notifications and for completing financial re-assessments.
3. Validate income, expenditure and capital (including property ownership) information provided by clients during the financial assessment, by checking bank statements, receipts, bonds, trust, Land Registry, DWP and Revenues and Benefit records.
4. Ensure that opportunity to maximize client income through welfare provision is exploited, providing welfare advice to clients and supporting client benefit applications. Refer complex welfare issues to the Welfare Rights Team as appropriate.
5. Inform clients and staff in the Payment & Billing Team of potential charges (or changes to existing charges) and respond to any queries relating to financial assessments.

6. Ensure that policies and procedures relating to financial regulation, and financial assessments are understood and applied consistently.
7. Apply the Council policy for Deferred Payment Agreements where a client's property is considered against the cost of service provided. Ensure that DPAs presented for approval are sustainable and mitigate the risk of income recovery.
8. Support the Council's debt recovery process by liaising with or revisiting clients who may fall into arrears, instigating a financial re-assessment and negotiating re-payments as appropriate.
9. Work effectively as part of a team, prioritise own workload, work to pre-determined deadlines and engage in multiple initiatives simultaneously, with a pursuit of excellence. Contribute as a member of a team. Visibly and positively respect, value, listen to and support others with a view to improving quality.
10. Put people at the heart of what you do and be responsive, ensure that you maintain a customer focus. Signpost clients to sources of information about Adult Social Care, including the Sefton Directory.
11. Develop partnerships within and outside of the Authority. Work corporately as well as collaboratively with a wide range of communities, partners and other agencies, building relationships that foster trust.
12. Contribute to the development and/or change of Council IT systems used for administration of Adult Social Care financial assessments. Participate in reconfiguration workshops and User Acceptance Testing for product change or release management activities, as requested.
13. Ensure that any visitors are met and attended to using the correct salutation, with due regard for the security of staff, the building and the equipment belonging to the service.
14. Respond to general correspondence, enquiries and complaints, both verbal and/or in writing, from a wide range of contacts, including clients, using the correct salutation. Ensure the provision of basic information, taking and recording of messages, generating and sending of standard information or redirection of more complex matters to appropriate officers, departments or agencies.
15. Undertake administrative tasks including data input, word processing, photocopying, filing, faxing, emailing, shredding and archiving documentation and records.

ORGANISATION CHART



* This post

SPECIAL CONDITIONS

Work outside normal hours may be required from time to time

A flexitime scheme is currently in operation.

This post is **exempt** from the provisions of Section 4(2) of the Rehabilitation of Offenders Act, 1974 by virtue of the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975. You are, therefore, not entitled to withhold information about convictions, which for other purposes are 'spent' under the provisions of the Act, and any failure to disclose such convictions could result in dismissal or disciplinary action by the Authority. Any information given will be completely confidential and will be considered only in relation to the positions to which the Order applies.

This post is designated as a Casual Car User. Casual car user allowance will be paid as appropriate.

GENERAL

New entrants to Local Government Service will be required to satisfactorily complete a six-month probationary period.

This job description is a representative document. Other reasonably similar duties may be allocated from time to time commensurate with the general character of the post and its' grading.

All staff are responsible for the implementation of the Health and Safety Policy as far as it affects them, colleagues and others who may be affected by their work. The post holder is also expected to monitor the effectiveness of the health and safety arrangements and systems to ensure that appropriate improvements are made where necessary.

Since confidential information is involved, the post-holder will be required to exercise discretion at all times and to observe relevant codes of practice and legislation in relation to data protection and personal information.

The Authority has approved a policy on Equal Opportunities in Employment and copies are freely available to all employees.

Prepared by:

Name

Karen Lee.

Designation

Team Manager - Business Support.

Date

17th September 2015.

**METROPLITAN BOROUGH OF SEFTON
PERSON SPECIFICATION**

Post: **Financial Assessment
Officer.**

Post No.

Department: **Adult Social Care**

Division: **Service Development &
Support**

Personal Attributes Required	Essential (E) or Desirable (D)	Method of Assessment
<p><u>Relevant Education / Training</u> Relevant Academic and/or Professional Qualification or equivalent experience/skills.</p>	E	AF/C/I
<p><u>Experience</u> A proven track record or ability of: Financial assessment and administration. Providing administrative support. Delivering customer focussed services. Attending to visitors and responding to enquiries with the correct salutation. Working effectively in partnership with a wide range of communities, partners and other agencies. Working to pre-determined deadlines and prioritising work effectively. Using IT applications and maintaining information systems. Presenting information to inform decisions.</p>	E E E E E E E E	AF/I AF/I AF/I AF/I AF/I AF/I AF/I AF/I
<p><u>Ability/Skills/Knowledge</u> Effective communication and interpersonal skills. Ability to work using own initiative and collaboratively with others to achieve outcomes. Ability to operate effectively with a high workload, delivering to expectation and deadlines. Ability to work in partnership at all levels, including negotiating, communicating and working collaboratively with internal/external organisations to achieve outcomes. Knowledge and understanding of financial assessments processes and national charging policies in an Adult Social Care setting.</p>	E E E E E	AF/I AF/I AF/I AF/I AF/I
<p><u>Personal Style and Behaviour</u> Personal commitment to delivering services effectively and efficiently. Able to respond to constructive challenge and not be discouraged. Motivated and enthusiastic. A team worker who fosters partnerships, works collaboratively demonstrates and promotes openness, trust and respect. Quality orientated, innovative and commitment to continuous improvement. Act as a role model for others demonstrating a 'can do' attitude and promoting positive challenge. Respects confidentiality.</p>	E E E E E E	AF AF AF AF AF AF/I

<u>Other Requirements</u> Evident commitment to personal continued Professional Development.	D	AF/C
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Prepared by: Karen Lee

Date: 17th September 2015.

AF = Application Form
I = Interview
C = Certificates
P = Presentation