

Job description

Job title: Financial Assessment Officer
Grade: Dorset Grade 6 (Level 1) and Grade 8 (Level 2)
Job evaluation reference: FN607 a/b
Job family: Financial Services

Purpose and impact

1. To conduct assessments of adult service user contributions towards the cost of their care. To carry out other financial assessments as necessary within the Directorate.

Additionally at Level 2:

2. To supervise the Level 1 Financial Assessment Officers.
3. To have responsibility for training and mentoring all staff within the team and carrying out the more complex financial assessments, including home visits where appropriate.
4. To carry out accuracy checks on Level 1 Financial Assessment Officers.

Key responsibilities

5. Obtain and verify the financial information necessary to carry out financial assessments by post or telephone and to financially assess the service user contribution in accordance with Care Act Legislation and Directorate's charging policy assuming maximum benefit entitlement.
6. Be familiar with the Care Act legislation and the Directorate's charging policy for all services and be able to interpret legislation.
7. Maintain up to date knowledge of state benefit entitlement and changes to legislation and advise service users of their entitlement to benefits.
8. Notify service users of their assessed contribution and follow standard procedures for legal charges on properties where appropriate.
9. Be aware of the possibility of deprivation of assets or income of service users applying for funding, and report to the Team Leader or Team Manager any applications that require further investigation.
10. To interpret information and respond to queries raised by service users, colleagues within Dorset Council and external organisations in respect of assessments and other financial related issues as appropriate.
11. Assist in putting in place deferred payment agreements.
12. Assist with the annual uprating process involving increasing the assessed contributions of all service users following annual increases in state benefits.
13. Deal with routine correspondence relating to service users on the caseload.
14. Any other lesser or comparable duties as required by the Financial Support Manager.

Additionally at Level 2:

15. Supervise the Level 1 Financial Assessment Officers, to review performance and set targets for work completion.
16. Act as mentor to new or inexperienced staff ensuring that full and comprehensive training is given in accordance with the Team Leader.



17. Ensure that 10% accuracy checks are carried out on Level 1 Financial Assessment Officers and any remedial training is given.
18. In addition to financial assessments by post and phone, carry out financial assessments by personal visit to the service user and/or their appointed agent.
19. Liaise with, and provide training, information and support to, colleagues within People - Adults, (locality teams, day services and County Hall), Income Section, Legal Services and Providers to ensure that a seamless service is provided to all colleagues, service users and customers.
20. Have a deeper knowledge and understanding of the Care Act legislation and Dorset Council's charging policy for all care services, (including residential, non-residential, Supporting People, and Direct Payments), keeping up to date with all changes to policy and legislation.
21. Investigate and report any suspicions of financial abuse to the Team Manager.
22. Lead in putting in place deferred payment agreements.
23. Lead on annual uprating process to implement annual increases in state benefits.
24. Deal with more complex correspondence relating to service users on the caseload.
25. Develop and maintain management information systems as required.

NB: The duties and responsibilities of this post are not restrictive, and the post holder may be required on occasion to undertake other duties. This will not substantially change the nature of the post.

Supervision and management

Reporting to: Financial Assessment Team Leader

Responsibility for: There will be some supervision and management responsibility at Level 2.

Other factors

26. Personal computers, shared printers, copiers, smart phones etc.
27. Responsible for ensuring data quality and as much the integrity of management information through the proper use and safeguarding of data and record system both manual and computerised.
28. The post holder will be based in County Hall, Dorchester.

Additionally at Level 2:

29. There may be a need to visit service users in their own homes, or in a residential care establishment or in a hospital setting.

Progression in Post

30. Progression from Level 1 to Level 2 is on the basis of demonstration of the full range of skills, experience and knowledge set out in the person specification and context statement.

Our values

Our values act as guiding principles, defining what we believe is important in the ways we work together. Our values are Respect, Together, Accountability, Openness and Curiosity. You will need to be able to demonstrate these values in action through the way you work,



regardless of your role within the organisation. Information about our values can be found on our website.



Person specification

Your application will be assessed based on your demonstration of how you fulfil the following criteria; you should include clear examples of how you meet these criteria within your application form and during the assessment process.

Essential

Essential criteria are the minimum requirement for the above post and will be assessed through a combination of your application form, assessment, interview and references (as specified below). We will require evidence of the qualifications, training or registrations listed below.

Qualifications, training or registrations Required by law or essential to the performance of the role or both	Assessed through:
1. Minimum of 2 A-Levels or equivalent qualification and/or equivalent experience	Application form
Additionally at Level 2:	Application form
2. Degree or equivalent qualification and/or equivalent experience	
Experience	
3. Relevant practical experience	Application form
4. Significant experience of working with customers	Application form
5. Experience of communicating with a wide range of people in order to obtain specific, detailed and accurate information	Application form
6. Demonstrable experience of completing and processing forms in accordance with pre-defined procedures	Application form
Additionally at Level 2:	
7. Proven experience of working in a financial services environment	Application form
8. Experience of communicating with a wide range of people in order to obtain specific, detailed and accurate information	Application form
9. Significant experience of dealing with customers	Application form
10. Experience of dealing with complainants	Application form
11. Proven experience of undertaking financial assessments	Application form
Knowledge	
12. Good knowledge of office practices and procedures	Application form Interview Assessment
13. Good and up to date knowledge of IT including Word and Excel	Application form Interview Assessment
14. Understanding of financial procedures	Application form Interview Assessment
Additionally at Level 2	
15. Up to date and comprehensive knowledge of Welfare Benefits System and benefit entitlements	Application form Interview Assessment
16. Up to date knowledge of The Care Act Legislation and Local Authority	Application form



	Interview Assessment
Skills and abilities	
17. Good inter-personal skills	Interview Assessment
18. Effective written and oral communication, including listening and enquiry techniques	Interview Assessment
19. Ability to interpret legislation and to simplify this to give advice to others	Interview Assessment
20. Ability to retain information	Interview Assessment
21. Ability to produce accurate work	Interview Assessment
22. Ability to plan, prioritise and organise work effectively with minimum supervision	Interview Assessment
23. Ability to meet deadlines/timescales and to work under pressure	Interview Assessment
24. Ability to adopt a systematic approach in the completion and processing of claims, following established procedures	Interview Assessment
25. Ability to undertake numerical calculations appropriate to the post	Interview Assessment
26. Ability to cope with difficult situations effectively	Interview Assessment
27. Ability to positively embrace change, demonstrate flexibility and a willingness to take on new ideas and ways of working	Interview Assessment
28. Ability to work as part of a team	Interview Assessment
Additionally at Level 2	
29. Ability to negotiate and persuade	Interview Assessment
Our values	
30. Respect	Interview Assessment
31. Together	Interview Assessment
32. Accountability	Interview Assessment
33. Openness	Interview Assessment
34. Curiosity	Interview Assessment
Other	
35. Ability to fulfil the travel requirements of the post	Application form
36. Ability to use initiative and have an investigative manner	Application form



Desirable

Desirable criteria will be used in the event of multiple applicants meeting the minimum essential requirements and if applicable, will be assessed through a combination of your application form, assessment, interview and references (as specified below). If you meet the desirable criteria, we will require evidence of the qualifications, training or registrations listed below.

Experience	
37. Experience of staff supervision	Application form
38. Previous experience of working in a Benefits Agency, Benefits Advice Agency or similar	Application form
39. Experience of financial audit and personal accounts	Application form
40. Experience of dealing with vulnerable/older people	Application form
Knowledge	
41. At level 1 - Up to date knowledge of The Care Act Legislation and Local Authority	Application form Interview Assessment
42. Up to date knowledge of the welfare benefit system and benefit entitlements	Application form Interview Assessment

Approval

Manager's job title: Christopher Watkins, Financial Support Manager

Date: March 2021

