To accompany job description and person specification when required

**Job title:** Financial Assessment Assistant

**Directorate/Service/Team:** Corporate Development, Finance and Commercial, Financial Assessment and Benefits (FAB)

**Organisation Structure**

Reporting to: Team Leader (FAB)

Responsibility for: Finance and Commercial is the responsibility of the Corporate Director Finance and Commercial, who is the designated deputy Chief Financial Officer. The Corporate Director reports to the Executive Director for Corporate Development, and is responsible for Pensions, Commercial and Procurement, Strategic Finance, Policy and Compliance (Finance), Operational Finance and Revenues and Benefits, and provision of certain financial services to external bodies such as Tricuro.

The Accountancy Function is headed by the Corporate Director, who is also the Deputy CFO, and provides accountancy and financial support to the four Directorates of Corporate Development, Place, People – Adults & Housing and People - Children. In addition, the Accountancy Function is responsible for the payment of invoices and collection of income, preparation of the statutory accounts and taxation advice and compliance. There is a Head of Service and Service Managers who report to the Corporate Director who support the four Directorates and the corporate accountancy and exchequer functions. The Financial Support area, which includes the Financial Assessment and Benefits Team, sits within the People – Adults & Housing team within the Accountancy Function.

The Financial Assessment Officer post reports to a Financial Assessment Team Leader, who in turn reports to the Financial Assessment Team Manager.

The Financial Assessment Officer completes financial assessments of the ability of users of adult social care to contribute towards the cost of that care. This is regulated by The Care Act and supplemented by internal procedures.

**Context of Work**

The Financial Support Team is placed within Finance and Commercial and deals with a range of functions including assessing people’s contribution to their care, direct payments for people who manage their own care, raising invoices to service users for their care and paying providers of care.

The post holder will be required liaise with colleagues in other teams who may have a link to care packages. These may include the Direct Payments team, the Adults Invoicing team, Care Management teams, IT Services, Brokerage and the NHS/CCG.

Additional tasks include speaking with or writing to service users, executors, solicitors and family members. Good communication skills are essential.

The work will require accurate record keeping and a good knowledge and application of spreadsheets together with data interrogation and the production of reports and using these reports to ensure accurate billing and invoicing takes place.

The post holder maybe required to work in other areas of the Finance Team as necessary carrying out similar tasks and there will be opportunities to learn new skills. You may also have the opportunity to work on different projects with colleagues from other areas of the Directorate. Experience of training others would be beneficial.

**Travel Requirement**

Most of the work will be based in Dorchester, though some home working may be possible.

**Other information**

The Finance and Commercial Service Plan will set the scope and vison of the service for the future years as the authority goes through transformational change This context statement has been prepared and will be maintained by the service.

The ability to converse at ease with customers and provide advice in accurate spoken and written English is essential for the post.

The post is subject to an enhanced Adults DBS check.

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| **Context statement prepared by:** | | | |
| Manager | Financial Support Manager | Date | 25/02/20 |