

# Job description

**Job title:** Financial Assessment Assistant

**Grade:** Dorset Council Grade 5

**Job evaluation reference:** SS056

**Job family:** Financial Services

## Purpose and impact

1. To assist with the effective operation of the Financial Assessment and Benefits Team. Responsibilities will include collating information, maintaining spreadsheets, providing advice to service users or their representatives and general office duties to include telephone enquiries.

## Key responsibilities

2. To have an up to date knowledge of relevant Care Act legislation, state benefits, advocacy services and to provide information and advice on the financial aspects of charging for care services to service users and/or their relatives/agents. This will include advice on Powers of Attorney and Court of Protection and providing guidance when service users are unable or unwilling to act for themselves.
3. Keep the database updated, to monitor progress of all referrals, issue reminders as appropriate, ensure that deadlines are met and keep the Financial Assessment Team Leader informed of any undue delays, issues or problems.
4. To ensure that the whereabouts of all visiting officers is known and that all local health and safety procedures are followed bringing any problems or potential problems to the notice of the Financial Assessment Team Manager.
5. To provide support to the Financial Assessment Officers and Financial Assessment Team Leaders, maximising income and assessing charges for care services. This will include input onto the Dorset Council computer systems providing assistance and information to fieldworkers, the income team, care providers, Department of Work and Pensions and bank staff, and dealing with routine correspondence relating to service users on the caseload.
6. To interpret information and respond to queries raised by service users, colleagues within Dorset Council and external organisations in respect of financial assessments.
7. To keep an accurate record of caseload and follow-up cases, and supply management information when required.
8. To carry out checks on relevant computer systems to ensure that all information is accurate, and details of the current benefit entitlement is recorded.
9. To report to the Team Leader any application considered fraudulent or suspected misappropriation of funds or financial abuse.
10. To provide assistance and information to Directorate staff including responding to queries and interpretation of information.
11. Carry out defined financial administrative tasks as required.
12. Any other lesser or comparable duties as required by the Financial Assessment Team Manager.



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**

13. Reporting to: Financial Assessment Team Leader

### **Other factors**

14. Personal computers, shared printers/copiers etc.

15. Responsible for ensuring data quality and as such the integrity of management information through the proper use and safe keeping of data and record systems both manual and computerised.

### **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.

<b>Qualifications, training or registrations</b> Required by law or essential to the performance of the role or both	<b>Assessed through:</b>
1. Minimum of 4 GCSEs at grade C or above, including English or Maths, or equivalent recent office experience within a professional working environment where good literacy and numeracy skills are required	Application form
<b>Experience</b>	
2. Relevant practical general office experience	Application form
3. Experience of working with customers	Application form
4. Demonstrate experience of completing and processing forms in accordance with pre-defined procedures.	
<b>Knowledge</b>	
5. Good knowledge of basic office procedures	Application form Interview Assessment
6. Good and up to date knowledge of IT including Word and Excel (ability to use spreadsheets) with good keyboard skills	
7. Understanding of financial procedures	
<b>Skills and abilities</b>	
8. Effective written and oral communication, including listening and enquiry techniques.	Interview Assessment
9. Numerate and literate	Interview Assessment
10. Ability to retain information	Interview Assessment
11. Ability to plan, prioritise and organise work effectively with minimum supervision.	Interview Assessment
12. Ability to meet deadlines/timescales and to work under pressure	Interview Assessment
13. Ability to positively embrace change, demonstrate flexibility and a willingness to take on new ideas and ways of working.	
14. Ability to work as part of a team.	



15. Ability to produce accurate work.	
16. Ability to interpret legislation and to simplify this to give advice to others.	
<b>Our values</b>	
17. Respect	Interview Assessment
18. Together	Interview Assessment
19. Accountability	Interview Assessment
20. Openness	Interview Assessment
21. Curiosity	Interview Assessment
<b>Other</b>	
22. Able 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.

<b>Qualifications, training or registrations</b>	<b>Assessed through:</b>
23. European Computer Driving License (ECDL)	Application form
<b>Experience</b>	
24. Previous experience of working in a Benefits Agency, Benefits Advice Agency or similar	Application form
25. Experience of dealing with vulnerable and/or older people.	
<b>Knowledge</b>	
26. Up to date knowledge of the Welfare Benefits System	Application form Interview Assessment
27. Up to date knowledge of the Care Act legislation and Local Authority's responsibilities under that Act	

## Approval

Manager's job title: Service Manager Finance  
Date: October 2019

