

## Job Description

Job title	Financial Assessment Officer
Directorate	PEOPLE : Children and Adults
Division	Adult Social Care
Range	MPR 4
Reports to	Team Manager Financial Assessment

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### Main purpose of the job:

Conduct financial assessments and annual reviews under the Council's Charging Policies, by visit and through desk-based work, in accordance with defined legislation, procedures and timescales so that the Council may correctly charge for social services care packages.

To work out contributions in line with the Council's Fairer Charging Policies, Charging Regulations and Accommodation Guidelines, Care Act 2014, Third Party Policy and offer practical assistance and advice with the relevant welfare benefit claim processes.

Liaise with stakeholders in a way that promotes the [vision and values](#) of the Council.

### Accountabilities and outcomes:

Apply the Council's fairer charging policy and Charging Regulations and Accommodation Guidelines, Care Act 2014, when completing financial assessments in order to maximise income to the authority.

Visit the clients as necessary to explain the financial assessment process, establishing needs and identifying Safeguarding issues as appropriate.

Determine potential welfare benefit entitlement and offer practical assistance and advice with the relevant welfare benefit claim processes, completing claim forms where necessary.

Determine Service User eligibility for a Deferred Payment Agreement and evidence decisions to either accept or refuse applications, liaising with Legal Services to formalise the Deferred Payment Agreement.

Maintain accurate records and retain documents in accordance with social care system procedures.

Operate in accordance with joint working and/or partnership agreements in place with other agencies, including the Department for Work and Pensions and other Council Departments, including Benefits and Local Taxation.

Identify safeguarding or potential deprivation of assets concerns, to ensure the welfare of the service user and maximise the income to the authority

At the discretion of the Head of Service, such other activities as may from time to time be agreed consistent with the nature of the job described above.

### Key Corporate Accountabilities:

To work with colleagues to achieve service plan objectives and targets.

To understand and actively keep up to date with GDPR responsibilities, including completing regular refresher training.

Safeguarding is everyone's responsibility: all employees are required to act in such a way that safeguards the health and well-being of children and vulnerable adults.

As a corporate parent, all council employees are responsible for ensuring the well-being and positive outcomes of Medway's care-experienced children and young people.

To participate in the Performance Appraisal process and contribute to the identification of own and team development needs utilising the Career Progression Framework.

Work in accordance with the Equality Act 2010 and the Public Sector Equality Duty to eliminate unlawful discrimination, harassment and victimisation. Promoting equality of opportunity, fostering good relations and improving the quality of life and opportunities for everyone living and working in Medway.

To ensure full compliance with the Health and Safety at Work Act 1974, the Council's Health and Safety Policy and all locally agreed safe methods of work.

To fully understand and be aware of the commitment to the duty under Section 17 of the Crime and Disorder Act 1998 to prevent crime and disorder.

Promote the Medway Carbon Neutral by 2050 commitment; supporting the Council action plan to ensure we play our part in addressing the climate emergency.

Medway Council is a Category One responder in relation to the Civil Contingencies Act (2004) and as a result all staff working for the Authority may be asked to carry out Category One response duties or stand into the role of another member of staff who is responding to a Major Civil Incident.

### Accountabilities to the Adults we work with:

- Be a good listener.
- Be non-judgemental.
- Be consistent and stable.
- Be contactable.
- Understand me.
- Be honest.
- Be focused.
- Be realistic.
- Be a good timekeeper.

- Be resourceful in your approach.

Be ambitious and professionally curious for adults with care and support needs and promote others to share the same drive.

‘Make no decision about me without me.’

### Organisation:

This role reports to the Team Manager Financial Assessment.

The post holder will not be required to line manage others but may be required to direct, coordinate or train other employees.

The post holder will be required to liaise with all stakeholders both internal and external to the organisation.

### Working Style:

HYBRID - a flexible working arrangement whereby an employee can undertake their work either in the office and/or partially or mainly from home on a temporary or permanent basis.

## Person specification

All criteria at level A are considered essential unless stated otherwise.

### Qualifications

#### Level A

- A minimum of 5 GCSE's (grades 4-9) or equivalent, including Maths and English

#### Level B (in addition)

- Completion of all mandatory training.

#### Level C (in addition)

- Working towards ILM Level 3 in Management or equivalent qualification.
- Evidence of continuous professional development.

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### Knowledge

#### Level A

- Knowledge of the Care Act 2004 and Mental Capacity Act 2005
- Knowledge of safeguarding policies and procedures.
- Knowledge of DWP legislation.
- Knowledge of General Data Protection Regulations (GDPR)

#### Level B (in addition)

- Ability to apply knowledge and experience in the application of relevant legislation, statutory guidance, standards and procedures relating to the Care Act, Mental Capacity Act and Safeguarding.
- Extensive knowledge, experience and understanding of working with vulnerable adults and children.
- Extensive knowledge of Social Care and Financial Assessment legislation, guidance and practice relevant to service users and care.
- Awareness of information governance, record retention, and confidentiality issues.
- Working knowledge of the Council's financial procedures appropriate to the role.
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#### Level C (in addition)

- Detailed knowledge and experience in the application of relevant legislation, statutory guidance, standards and procedures relating to the Care Act and Mental Capacity Act.

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### Experience

#### Level A

- Practical experience of financial administration and carrying out numerical calculations.
- Experience of working with vulnerable adults.

#### Level B (in addition)

- Ability to contribute to team plans and objective setting, initiating ideas for managing their own and others workloads.
- Experience of providing financial advice and guidance.
- Experience of providing advice and guidance in relation to welfare benefits.

### Level C (in addition)

- Demonstrable experience of providing direction, mentoring and training other team members’.
  - Extensive experience of taking initiative in situations, able to identify own development needs and able to coach and work with others to share best practice and new knowledge.
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## Skills

### Level A

- Proficient in the use of Microsoft Word, Excel, PowerPoint, Teams and Outlook
- Full UK driving licence and access to a vehicle— the Council is committed to making reasonable adjustments so whilst this job requires the post holder to drive your application will still be considered if you are unable to drive due to a disability.
- Ability to demonstrate excellent customer care skills, with experience of adapting services, where possible, to meet customer needs and can take the initiative to work with other agencies where necessary.
- Excellent communication skills with the ability to present complex and/or sensitive information in an understandable way.
- Ability to maintain effective and efficient financial administrative systems ensuring that office procedures are adhered to.
- Ability to work under pressure and respond effectively to rapidly changing priorities and deadlines.
- Compliant with Data protection and GDPR

### Level B (in addition)

- Ability to build strong relationships with the team but also with stakeholders and customers.
- Demonstrable experience of planning ahead and having the ability to respond positively to change.
- Ability to monitor the effects of decisions, taking account of risks and being prepared to take ownership of actions, and modify own and others work practices where necessary.
- Ability to show sound judgement in decision making, resolving problems and providing direction in complex and sensitive situations.

### Level C (in addition)

- High level of analytical and data interpretation expertise and accurate attention to detail including a history of working to a high level of accuracy and problem solving
- Commitment to continually seek and implement improvements and helping others to cope with change.
- Ability to effectively manage the workload including prioritising work and delivering outcomes within defined timescales.
- Promotes positive approaches to diversity, identity and equality.