



**WOKINGHAM  
BOROUGH COUNCIL**

**Job Description**

Job Reference

713098

|                 |  |      |                       |
|-----------------|--|------|-----------------------|
| Job Title       | Financial Assessment Review Officer - Apprenticeship                     |      |                       |
| Service         | Financial Assessments & Payments<br>ASC/Prevention & Short-Term Services | Team | Financial Assessments |
| Location        | Hybrid – Shute End/Work from Home  |      |                       |
| Reports to      | Senior Financial Assessments & Payments Officer                          |      |                       |
| Responsible for | n/a  |      |                       |
| Grade           | Type of position:  |      | Date                  |
| Grade 1         | 18 month - Fixed Term<br>Full Time -Apprenticeship                       |      |                       |

This job description has been designed to indicate the general nature and level of work required of the post to indicate the level of responsibility. It is not a comprehensive or exhaustive list, and the line manager may vary duties from time to time which do not change the general character of the job, or the level of responsibility entailed.

**Service Purpose**

Conduct financial assessments in respect of social care services customers to decide if a financial contribution is required, whilst maximising income for the Council and the Customer.  
To undertake the Council’s Direct Payment offering, ensuring agreements are signed, customers paid in the most appropriate way and funds are correctly spent and monitored.  
Raising of Purchase Orders, paying provider invoices and invoicing of charges.

**Purpose of the role**

Part of the Financial Assessments & Payments Team within Adult Social Care responsible for reviewing customer contributions towards the cost of their care, ensuring it is correct, and their charge is based on up-to-date information, in line with the Council’s policy and the Care Act 2014. Where relevant, ensure any entitlement to welfare benefits and allowances is maximised.

**Main Accountabilities**

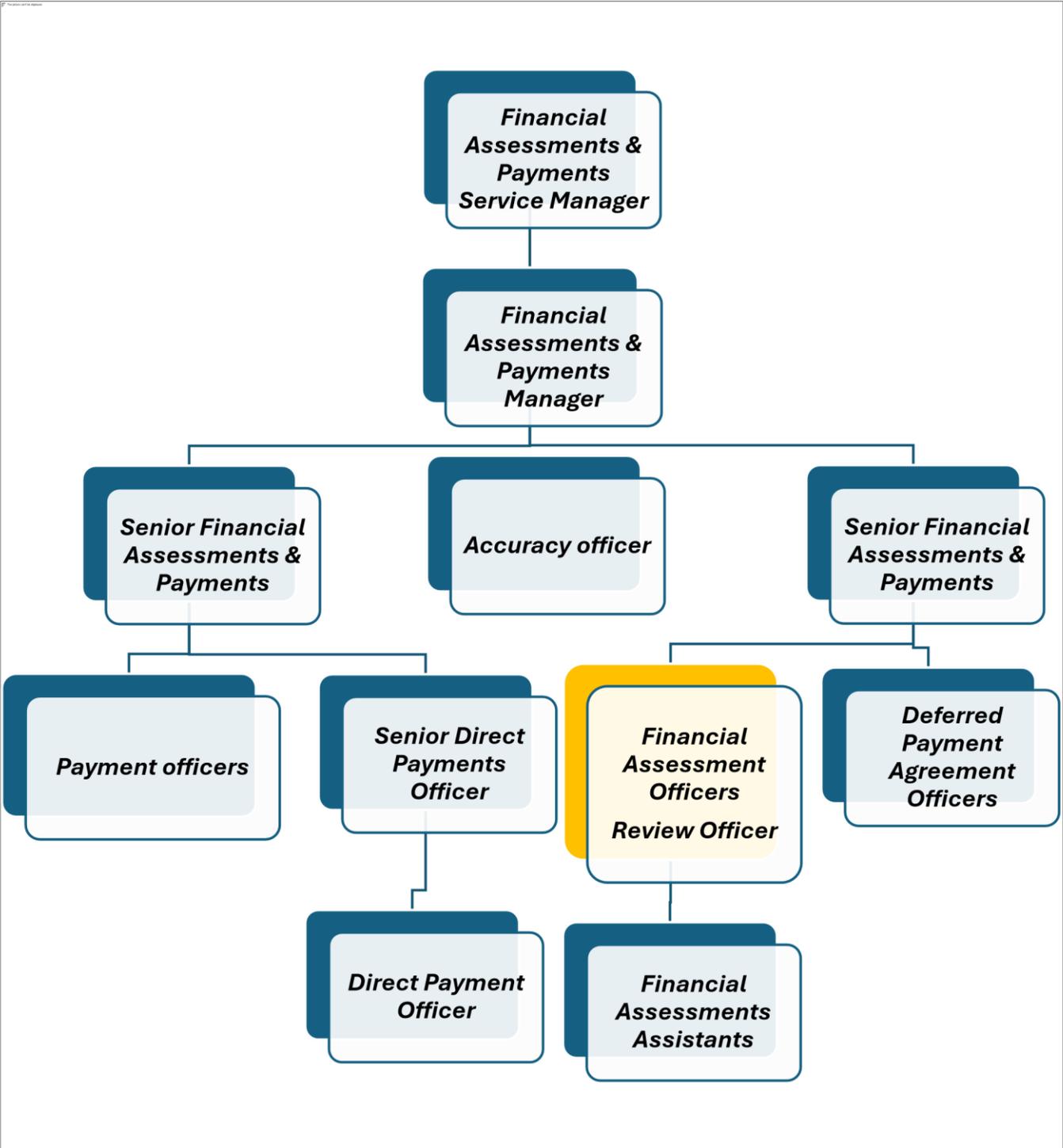
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| 1                           | Conducts financial assessments reviews and annual reviews under the Council's Charging Policies and other legal frameworks, through desk-based work, in accordance with defined legislation, procedures and timescales so the Council may correctly charge for social services care packages, respite and residential care.  |
| 2                           | Ensure the review of the assessments are dealt with correctly and in a timely manner, giving advice and guidance as required.  |
| 3                           | To obtain, record, review, verify and collate financial information/evidence for financial assessment reviews and to undertake all aspects of review work both for non-residential and residential adult social care charging within agreed timescales to meet team targets. This could be through a variety of channels including home visits, appointments at the Council's Offices, e-mail, post, or telephone. |
| 4                           | Give general advice and guidance to customers and their representatives in respect of other welfare & council benefits utilising software packages available.  |
| 5                           | Maintain sufficient records so that all appropriate monitoring and statistical records covering the function can be compiled on a monthly, quarterly, and annual basis.  |
| 6                           | Keep updated with current legislation and government changes, specifically in connection with the Care Act 2014 and the Mental Capacity Act 2005.  |
| 8                           | Ensure that any Adult Protection Safeguarding issues are escalated through appropriate channels.   |
| 9                           | To proactively identify service improvements, making recommendations to improve overall service delivery and customer service or working practices with knowledge of legislative requirements, quality assurance objectives and good practice. This may include contributing to development of IT systems to support improvements  |
| 10                          | To provide explanations and support to colleagues and clients about charging policies.<br>Respond to enquiries in writing, face to face and by telephone, providing accurate information in easy-to-understand language  |
| 11                          | Liaise with legal services to seek advice on complex legal issues relating to financial assessment reviews, where appropriate  |
| 12                          | To help train and coach colleagues on the team including new colleagues and cross training within the team as well as attend relevant meetings.  |
| <b>Supervision Received</b> | Reports to Senior Financial Assessments Officer who also provides supervision.   |

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|---|--|
| <b>Supervision Given</b>                    | n/a  |
| <b>Contacts &amp; Working Relationships</b> | <i>Internal – Adult Social Care Teams, service user, third party, DWP,</i> |
| <b>Management of resources or budget</b>    | n/a  |

|                        |  |
|------------------------|--|
| <b>Special Factors</b> | <i>Driving licence</i><br><i>DBS check</i> |
|------------------------|--|

**Organisational Chart**



**Person Specification**

Focus on describing the qualifications, skills, knowledge and experience an individual will require to successfully undertake the role. These should be split between essential and desirable.

| <b>Qualifications</b>   | <b>Essential</b> | <b>Desirable</b> |
|---|------------------|------------------|
| Good level of general education to a minimum of GCSE (or equivalent) standard or above          | E                |                  |
| <b>Technical Skills.</b>  | <b>Essential</b> | <b>Desirable</b> |
| Excellent customer care skills, with the ability to communicate at all levels.                  | E                |                  |
| Effective written & verbal communications skills  | E                |                  |
| Ability to work under pressure and use own initiative to organise and prioritise own work loads | E                |                  |
| To be compassionate, empathetic, and understanding  | E                |                  |

|   |                  |                  |
|---|------------------|------------------|
| To be PC literate with organisational and numeracy skills | E                |                  |
| <b>Knowledge</b>  | <b>Essential</b> | <b>Desirable</b> |

|  |                  |                  |
|--|------------------|------------------|
| . Understanding of the Care Act 2014                         |                  | D                |
| Understanding of the Mental Capacity Act 2005                |                  | D                |
| Relevant Council policies                                    |                  | D                |
| Working knowledge of welfare benefits available to customers |                  | D                |
| <b>Experience</b>  | <b>Essential</b> | <b>Desirable</b> |
| Previous experience of working in an office environment      |                  | D                |
| Experience of working with vulnerable customers              |                  | D                |
| <b>Other</b>   | <b>Essential</b> | <b>Desirable</b> |
| Needs to have a driving license and use of a car.            | E                |                  |
| DBS check required   | E                |                  |
|  |                  |                  |
| <b>Completed by:</b>   |                  | <b>Date:</b>     |