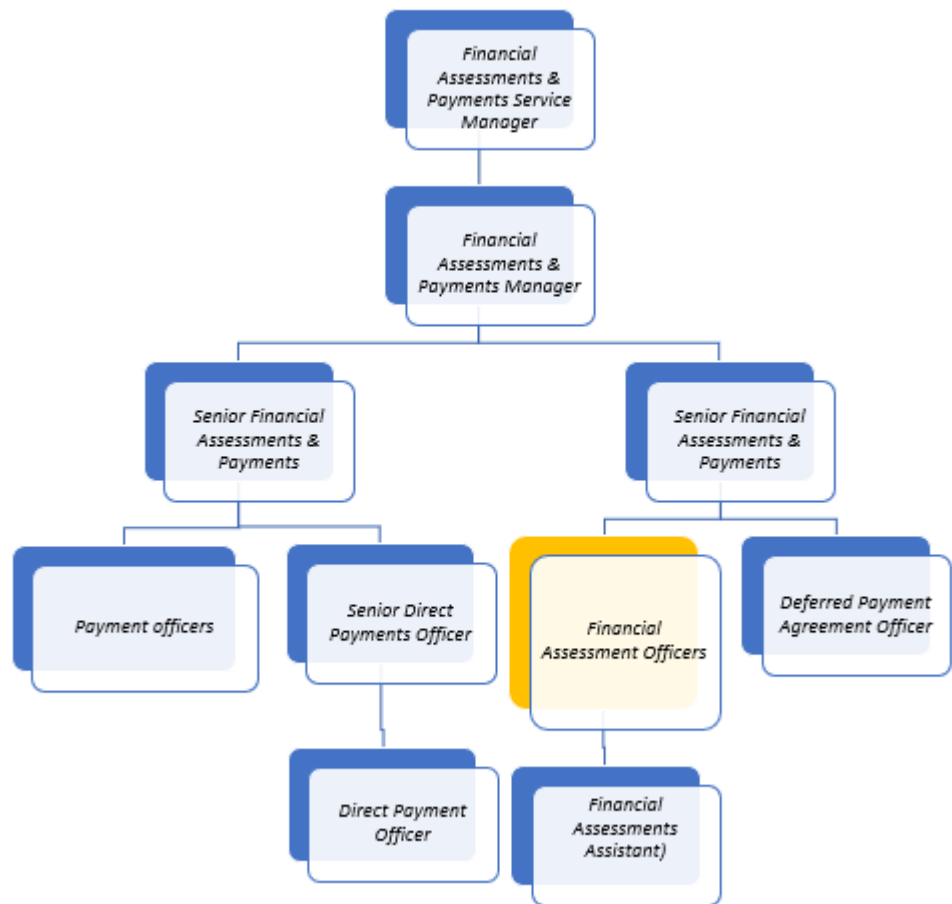
 WOKINGHAM BOROUGH COUNCIL	Job Description		Job Reference
			712369
Job Title	Financial Assessment Officer		
Service	Financial Assessments & Payments ASC/Prevention & Short-Term Services	Team	Financial Assessments
Location	Hybrid – Shute End/Work from Home		
Reports to	Senior Financial Assessments & Payments Officer		
Responsible for	n/a		
Grade	Type of position:		Date
Grade 6	12-month fixed term contract Full Time		
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.			
<u>Service Purpose</u>			
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.			
<u>Purpose of the role</u>			
Part of the Financial Assessments & Payments Team within Adult Social Care responsible for assessing if individuals need to make a financial contribution towards the cost of their care, in line with the Council’s policy and the Care Act. Where relevant, ensure any entitlement to welfare benefits and allowances is maximised.			
<u>Main Accountabilities</u>			
1	Conducts financial assessments 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 that the Council may correctly charge for social services care packages, respite and residential care.		
2	Ensure that assessments and case visits 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 and to undertake all aspects of the financial assessment work both for non-residential adult social care charging and Charging for Residential accommodation 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.
7	Ensure that any Adult Protection Safeguarding issues are escalated through appropriate channels.
8	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
9	To provide explanations and support to colleagues and clients about charging policies. Respond to enquiries in writing, face to face and by telephone, providing accurate information in easy-to-understand language
10	Liaise with legal services in order to seek advice on complex legal issues relating to financial assessment, where appropriate, and to ensure that any Deferred Payment Arrangements are properly processed.
11	To liaise with budget holders/care managers regarding without prejudice cases and doing COP100 to confirm when Court Of Protection awarded to protect WBC funding and reduce debt to the council
12	To help train and coach colleagues on the team including new colleagues and cross training within the team as well as attendance at relevant meetings.
Supervision Received	Reports to Senior Financial Assessments Officer who also provides supervision.
Supervision Given	n/a
Contacts & Working Relationships	<i>Internal – Adult Social Care Teams, service user, third party, DWP,</i>
Management of resources or budget	n/a

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Special Factors	<i>Driving licence DBS check</i>
<u>Organisation Chart</u>	

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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.

Qualifications	Essential	Desirable
Good level of general education to a minimum of GCSE (or equivalent) standard or above	E	
Technical Skills.	Essential	Desirable
Excellent customer care skills, with the ability to communicate at all levels.	E	
Effective written & verbal communications skills	E	

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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	

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

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