Financial Assessment Officer 

JE Code:JE1346

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| **Values – We are dedicated, respectful, collaborative, we are Milton Keynes Council** |
| **Service** | Finance Transactions |
| **Reports to:** | Senior Financial Assessment and Charging Officer |
| **Job Family** | Professional & Technical |
| **Grade:** | F |
| **Political restricted** | Y/N |
| **Date:** | September 2023 |

**Key Deliverables**

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| **1.** | Responsible for the prompt and accurate production of client financial assessments and reassessments for Adult Social Care service users ensuring that financial regulations and statutory obligations are met in line with the Care Act 2014. This includes where appropriate, identifying, calculating and recording Service Users’ Disability Related Expenditure, to ensure the accurate calculation of Financial Assessments, investigating property issues and establishing eligibility for Deferred Payment Applications. |
| **2.** | Provide welfare benefit advice and guidance, identifying customer benefits and providing practical assistance in making timely claims to maximise the service user and council’s income. Monitoring the outcome of awards and completing re-assessments of the service user’s contribution. |
| **3.** | Undertake service user visits where appropriate, providing advice and guidance, supporting the completion of accurate financial assessments and obtaining relevant evidence to support the information captured. |
| **4** | Undertake complex case management. Investigate, respond to and resolve service requests and queries ensuring operational service priorities are met through ownership, adhering to agreed service standards, legislation and guidance and according to operational procedures. Escalate any complaints and potential safeguarding issues in accordance with the relevant procedures. Support the resolution of queries and complaints. |
| **5** | Take responsibility and ownership on areas of the service where improvements could be made. Recognising and adapting to the changing needs of the service by making recommendations and implementing agreed changes to improve efficiency and the service provided. |
| **6** | Work collaboratively on projects that support developments and improvements for the Financial Assessments service in a professional and positive way. Support system implementations including conducting system testing and delivering training to staff on new system processes. |
| **7** | Manage own workload, processing high quality information / data accurately and in a timelymanner, ensuring that case notes are made and recorded to a high standard. Embed customer service excellence within the team through contributing to the design of customer focussed processes, active participation in team meetings / one-to-one meetings / the PADP process and own behaviours. |
| **8** | Work as part a team supporting your colleagues, mentoring Apprentices and Assistants to a high standard. Provide training to new Financial Assessment Officers as and when required to ensure high levels of standards are met. |
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*Within reason these key deliverables may evolve to meet service need and it is expected that you will be flexible and adaptable in your delivery to meet both service and council wide needs*

**Essential Requirements (key skills & qualifications)**

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| **1.** | Educated to A Level / NVQ Level 3 or equivalent experience gained in a similar or related service.  |
| **2.** | Full Driving Licence. Ability to travel to visit service users where appropriate. |
| **3.** | Excellent IT skills with good knowledge of Microsoft office applications to produce system documentation and presentations. Knowledge of financial and case management systems e.g. ContrOCC, Liquidlogic and ERP. |
| **4.** | High level of numeracy and literacy. Ability to write clear and concise reports. Ability to process data and financial information related to the Financial Assessments Service to support the production of management reports. |
| **5.** | Ability to manage and prioritise own workload whilst at the same time work effectively as part of a team. Experience of working independently scheduling and prioritising own work and that of others to meet service requirements. |
|  | Experience of working in a customer focused role in a fast paced environment.  |
| **6.** | Knowledge of the Care Act 2014 and Welfare Benefit legislation. Ability to understand and interpret national legislation, policies and guidance and to ensure processes remain compliant with national requirements.  |
| **7.** | Ability to work with internal and external stakeholders, in particular vulnerable adults and their carers, to support the delivery of the Financial Assessments service in line with the annual service plan.  |
| **8.** | Ability to communicate effectively both verbally (face to face and by telephone) and in writing, in particular with vulnerable adults and their carers, in order to achieve desired outcomes. Be able to influence and negotiate when advising and supporting customers and service users.  |
| **9.** | Proven customer service background with experience of conflict resolution, negotiation and diplomacy skills.  |

Job Family 

Professional/Technical

Grade F

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| **Colleagues Expectations*** Be professional at all times
* Work together for the good of the team, council and local people
* Promote a supportive culture
* Challenge assumptions
* Take ownership
* Be willing to change and do things differently
* Always work in a safe manner
 | **Managers expectations*** Be a role model by displaying positive behaviours at all times
* Make well-considered decisions
* Support, coach and communicate with my team
* Be accountable for my team’s performance
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Professional/Technical job holders rely upon their deep knowledge of the specialism or discipline in which they work to carry out vital tasks and provide authoritative advice to others. Often developing within recognised career paths, their evolving expertise sees them bear increasing responsibility for managing Council assets, the development of policies and procedures and the strategic direction of the functions they support.

### Role Characteristics

At this level with dedicated specialist qualifications or an equivalent level of direct experience in their particular field, job holders deal autonomously with complex issues, analysing and forming judgements about not only their own technical or professional specialism, but also the attendant resource, finance, planning and similar issues that combine to challenge the job holder.

### The Knowledge and skills required

The range of knowledge required for these roles includes an understanding of the policies and procedures across the specialist area in which job holders work, as well as a solid underpinning of technical knowledge gained through dedicated formal education.

Job holders will have been working within the specific field for a reasonable time, such that they have been exposed to many of the routine and more unexpected circumstances of their role.

While the majority of roles will have demands for manual dexterity in relation to typing and similar functions, jobs will use a range of equipment requiring precision in their use and handling.

### Thinking, Planning and Communication

The situations and problems dealt with at this level will be increasingly complex, involving several information streams where analytical and judgemental skills will be needed to interpret information correctly and determine optimum solutions.

Job holders will have plenty of day to day issues to contend with, they will also need to plan some months ahead to achieve medium term objectives in such areas as project support or service development.

At this level, the information exchanged with internal and external colleagues, and members of the public will call for developed communication skills on the part of the job holders. Matters will be technically complicated, requiring careful explanation, or sensitive, requiring significant listening skills to interpret information and provide appropriate advice.

**Decision Making and Innovation**

Job holders will have the autonomy to adapt specific approaches to better meet medium term objectives. They will be bound by the recognised procedural framework of their specialism as it is managed by the Council, but will decide when and precisely how duties are to be carried out. They will also deal with problems (often escalated to this level) for which there are no set-down routes to a solution other than broad service practice guidelines.

### Areas of responsibility

With a diverse range of jobs being represented at this level, the precise blend of responsibilities for which the job holder is accountable will depend upon the service in which they operate.

External facing roles will focus on the needs of people whether external service users or partners, and will be responsible for high impact decision making and the implementation of appropriate programmes on behalf of individuals or groups of people or enforcement of regulations which have direct and significant consequences upon those served. Such roles are likely to have only modest levels of responsibility for finance, information assets, equipment and/or premises.

Internal roles are likely to have this pattern reversed, with weightier responsibility for significant financial and non-financial assets, but less for the assessment of needs of individuals and groups.

Jobs will have supervisory responsibility for the work of others and will be accountable for the quality and timeliness of outputs, whether related to the work of internal teams or temporary external contractors, volunteers or others.

### Impacts and Demands

Tasks and duties will be generally carried out in a sedentary position but there will always be a requirement for standing and walking from time to time, and the occasional need to lift or carry items.

The problem solving and decision-making elements of these jobs mean that job holders require lengthy periods of enhanced mental attention to attend to duties, while also dealing with deadlines, interruptions and conflicting demands.

Duties of jobs at this level will not require job holders to develop and maintain working relationships with people who, through their circumstances or behaviour, place particular emotional demands on the job holder.

Job holders find themselves exposed to some disagreeable, unpleasant or hazardous working conditions. Particularly when the needs of their specialism require them to work on external sites exposed to the weather, in or around refuse and waste plant, close to particularly noisy machinery and in similar environments.

Other Professional Technical jobs, such as enforcement roles, may also see job holders exposed to verbal abuse and threatening environments. In all cases, job holders will minimise risk and conform to health and safety regulations to mitigate any negative effects of such exposure.