

## ROLE PROFILE

**Role Title:** Assessment Officer

**Service Group:** Revenues and Benefits

**Accountable to:** Team Leader Revenues & Benefits  
**Grade:** F

**Date:** September 2017

**JE code:** JE1401 **Competency Level:** 1

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### **Purpose of job** (outline what, to whom and why)

To work in the Benefits Service to ensure that it meets its purpose to pay the right benefit to the right person at the right time to the resident of Milton Keynes. This includes all financial awards: Housing Benefit, Council Tax Reduction, Discretionary Housing Payments, Discretionary Council Tax Reduction and Local Welfare Assistance.

### **Key Objectives** (list what outcomes are essential)

1	Take action to ensure that applications for Housing Benefit, Council Tax Reduction, Discretionary Housing Payments, Discretionary Council Tax Reduction and Local Welfare Assistance are processed and paid promptly and correctly in accordance with legislation and procedures.
2	Resolve to conclusion telephone, face-to-face and written enquiries from residents of Milton Keynes, landlords, external agencies and other Council departments
3	Provide advice about welfare assistance and where applicable signpost customers to other agencies for help and support
4	Ensure that the Council Tax account information relating to the customer has the correct liability and if not, resolve any discrepancies that would affect the financial award
5	Take or initiate action, as appropriate, to ensure that overpayments of Housing Benefit, Council Tax Reduction, Discretionary Housing Payments and Discretionary Council Tax Reduction have effective recovery set or are identified as not being recoverable in line with policies & procedures and are recommended for write off

**Scope** (outline the size or scope of the role, direct or indirect responsibility for people, finances, resources and any special aspects of the role)

The Assessment Officer operates as a member of the Benefits Service, reporting to a Team Leader Revenues & Benefits. The post holder liaises with members of the public, landlords, other Council departments and external agencies.

The Benefit Service is responsible for the assessment of claims for Housing Benefit, Council Tax Reduction and Local Welfare Assistance. This includes Discretionary Housing Payments and Discretionary Council Tax Reduction.

Payments of Housing Benefit are made in respect of customers living in properties owned by both public and private landlords. Local Authorities pay Housing Benefit on behalf of the Department for Work and Pensions (DWP) and Council Tax Reduction which is a local scheme for those in need of financial support. The payment of Discretionary Housing payments is funded by DWP through a yearly grant and Discretionary Council Tax Reduction is supported through the Council's collection fund. Local Welfare Assistance is also financed through the Council.

Local Authorities reclaim the Housing Benefit that they have paid from the DWP and the Benefit Service is responsible for ensuring that it is claimed correctly. Currently this is circa £100m for Milton Keynes.

The Service aspires to deliver continual improvement and has in place robust systems to ensure accurate financial accountability for financial awards. We recognise the impact of our actions in terms of delivering quality services which are focussed on providing end to end resolution at the first and earliest point of contact, thereby ensuring maximum value for money for the Council and residents of Milton Keynes

The Service has an agreed 'purpose': to pay the right person, the right amount of benefit at the right time

The Assessment Officer makes decisions on the financial awards, accurately and in compliance with the legislation laid by Government and the policies and procedures drawn up by the Council. Accurate and timely awards have an impact on the customer and the overall economy of Milton Keynes. Each assessment officer will be making decisions on financial awards totalling £2m

There is no budget responsibility and no direct reports.

The service measurements to be used are:

- % end to end times for assessing awards;
- % of awards done in 1 day;
- % of work completed accurately and to conclusion first time;
- Assessment and financial accuracy.

**Work Profile** (outline the main areas of responsibility and accountability and competencies)

The Assessment Officer correctly identifies customers' requirements to ensure the customers' demand is resolved at the earliest point of contact.

They take appropriate and timely action to ensure that applications for Housing Benefit, Council Tax Reduction, Discretionary Housing Payments, Discretionary Council Tax Reduction and Local Welfare Assistance are processed and paid promptly and correctly in accordance with legislation and procedures. This includes:

- Taking claims for these financial awards and checking information for validity;
  - Obtaining the correct information and documentation;
  - Inputting the information onto the computer system and maintaining these records;
  - Making recommendations for backdating & write offs for overpayments;
  - Keeping customers informed about the decisions that are made in line with legislation.

The Assessment Officer resolves to conclusion enquiries received through all channels (written, telephone, face-to-face, email etc.) from residents of Milton Keynes, landlords, external agencies and Council departments.

They must deal with customers and other stakeholders courteously and empathetically, within the data protection requirements and in line with the Council's Customer Services Strategy

Where necessary, they provide advice and sign post customers to other agencies for welfare assistance and support based on their individual circumstances.

The Assessment Officer ensures that the Council Tax account liability information regarding the customer is correct and resolves any discrepancies that would affect the financial award before the award is made.

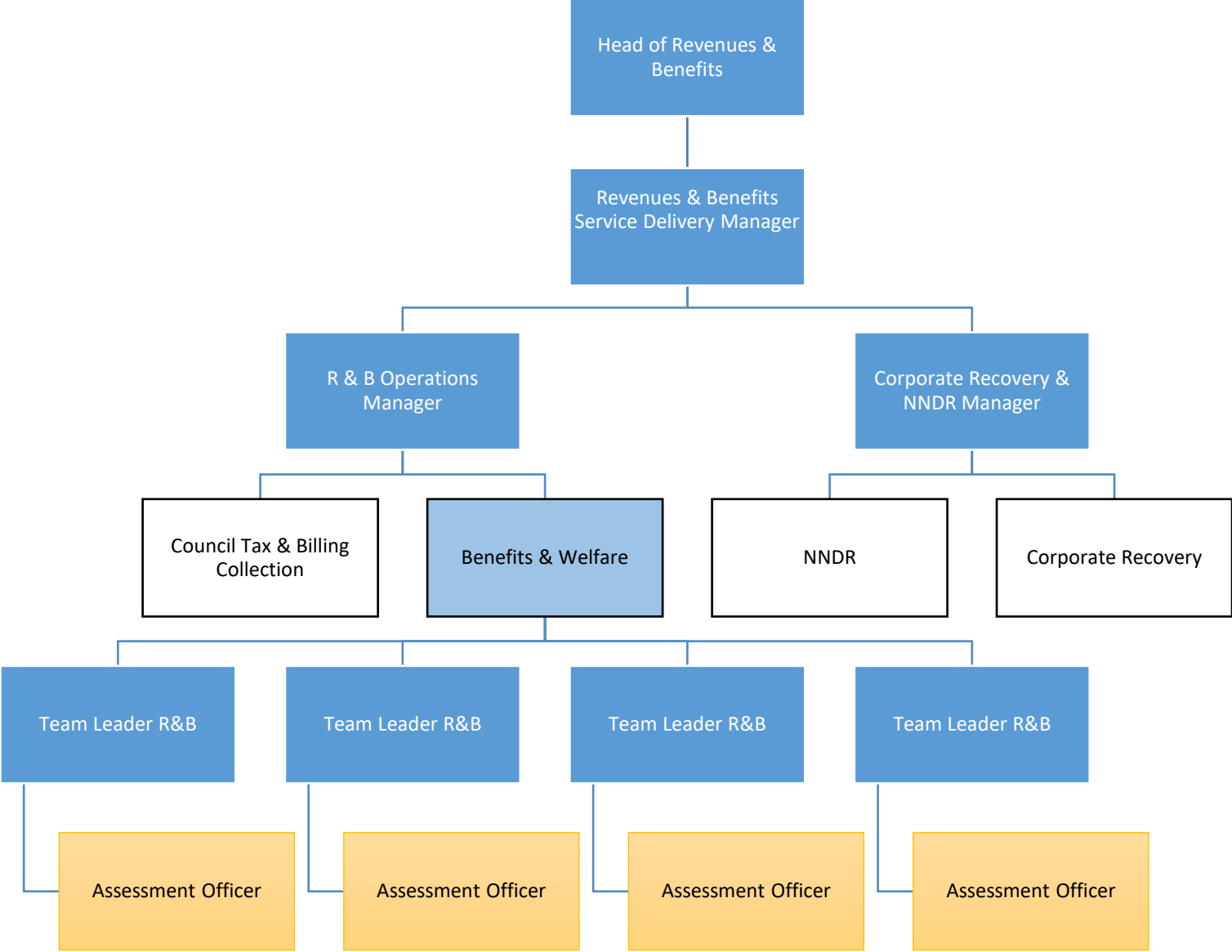
They take, or initiate, action, as appropriate, to ensure that overpayments of benefit are classified correctly, appropriate recovery action set or if not recoverable, are recommended for write off.

They adjudicate on requests for reconsiderations and revisions from customers that have been processed by other assessment officers to ensure impartiality.

They may be asked to assist in the skills training of other staff, being a buddy or shadowed by new and less skilled officers.

The Assessment Officer is required to assist in the continued improvement of the Benefits Service systems and procedures by identifying and reporting any potential improvements to a Team Leader Revenues & Benefits.

Job Context



## PERSON SPECIFICATION

In this section the Skills, Knowledge, Qualification and Competency requirements to perform the role to a satisfactory standard are set out. The extent, nature and level of the role holder's knowledge and skills should be specified

**Awareness** some knowledge or skills sufficient to show aptitude and the ability to learn in the particular work area

**Significant** knowledge and skills gained through practice and/or qualification sufficient to fulfill the role requirements

**Extensive** knowledge and skills gained through practice and/ or qualification to fulfill the role requirements and contribute to training others and developing policy and practice in the work area

PERSON SPECIFICATION	Examples specific to role	Required		Level			Method of Assessment application form, interview, testing, reference
		Essential	Desirable	Awareness	Significant	Extensive	
<b>SKILLS AND KNOWLEDGE</b>							
<b>Technical knowledge and qualifications</b>	GCSE English and Maths grade A – C or equivalent	X			X		Application / Interview
	IT literate in Microsoft Office applications	X		X			
	IRRV Technician/Level 3		X		X		
	Experience of working with, understanding and meeting the needs of customers	X			X		
	Experience in Housing Benefit and Council Tax Reduction processing activities		X		X		
	Good working knowledge of Housing Benefit legislation, or the ability to acquire it swiftly		X		X		
	Experience in a Welfare Advice role		X	X			
	Specific knowledge and ability in the use of Information@Work DMS, Northgate and Capita Benefit systems		X		X		
	Awareness of Council Tax legislation.		X		X		
	Knowledge/experience of systems thinking		X		X		
<b>Planning and organising work</b>	Ability to work accurately	X			X		Application / Interview

	Aptitude to learn and practice Systems Thinking Methodology	X			X		
<b>Planning capacity and resources</b>	Able visit customers in their home within acceptable time frames	X			X		<b>Application / Interview</b>
<b>Influencing and interpersonal skills</b>	Ability to communicate well	X			X		<b>Application / Interview</b>
	Flexibility in working with all stakeholders of the Service	X			X		
	Customer focussed	X			X		
<b>PROBLEM-SOLVING</b>							
<b>Using initiative to overcome problems</b>	Proven aptitude for and experience of working with numbers / financial calculations	X			X		<b>Application / Interview</b>
	Understanding and ability to work to relevant procedures and policies	X			X		
	Positive manner of working	X			X		
<b>Managing risk</b>	Strong commitment to equality of opportunity, diversity and promoting the rights of minority and under-represented groups, in employment and via the Service	X			X		<b>Application / Interview</b>
	Respectful of the sensitivity of service data and able to operate with integrity and using professional judgement at all times	X			X		
	Takes responsibility for self and environment to ensure that risks are minimised, dealing with potential risks, hazards and incidents appropriately.	X			X		
<b>Managing change</b>	Flexible and willing to adapt to change in busy and demanding work environment	X			X		<b>Application / Interview</b>
	Provides suggestions and feedback on working practices to improve the service.	X			X		
<b>ACCOUNTABILITY and RESPONSIBILITY</b>							<b>Application / Interview</b>
<b>Undertakes tasks without supervision</b>	Must be self- motivating and able to work on own completing required tasks	X			X		
	Take responsibility for quality and completion of own work within standards	X			X		

Managing people	n/a						
Managing financial resources	Understanding of, and desire to deliver, high quality, cost effective public services	X			X		Application / Interview

**COMPETENCIES REQUIRED** – All post holders must be able to comply with the Council’s core competency requirements, Customer Focus, Communicating and Engaging, Managing Resources and Risk, Organising and Improving Performance, Taking Responsibility, Team Player, and Excellent Leadership

**SPOKEN ENGLISH FLUENCY DUTY REQUIREMENT** - The ability to converse at ease with members of the public and provide advice in accurate spoken English is essential for this post.

**CORPORATE SAFEGUARDING STATEMENT** – All post holders must be committed to applying and upholding the Council’s Corporate Safeguarding Policy Statement. Specific safeguarding responsibilities should be detailed in this document.

**Other information e.g.**

- able to travel to meet service delivery requirements
- available to undertake work outside of normal working hours
- Must undertake BPSS checks which include Disclosure Scotland

Signed Line Manager	Signed Service Director	
Print Line Manager	Print Service Director	Date