 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:** | E |
| **Political restricted:** | Y/N |
| **Date:** | TBC |

**Key Deliverables**

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| **1.** | Calculate accurate client contributions in a timely manner, liaising with clients and/or representatives on pertinent financial information. Ensuring financial processes are completed in accordance with legislation, government guidance, and in line with council policy and procedures.  |
| **2.** | To maximise the service users and Council’s income through advice and assistance, identifying customer benefits and assisting the service user with these claims.  |
| **3.** | Investigate, respond to and resolve service requests and queries ensuring operational service priorities are met through ownership, adhering to agreed service standards. Escalate any complaints and potential safeguarding issues in accordance with the relevant procedures. |
| **4.** | 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 |
| **5.** | Liaise with Adult Social Care colleagues and other relevant professionals regarding financial assessments, notify residential and nursing care providers of user’s contributions and liaise over collection methods |
| **6.** | Work as part a team supporting your colleagues, mentoring Apprentices and Assistants. Provide training to new Financial Assessment Officers as and when required to ensure high levels of standards are met. |

*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 GCSE level, NVQ Level 2 or experience gained in a similar or related working environment, Excellent IT skills with good knowledge of Microsoft Office applications  |
| **2.** | High level of numeracy and literacy. Ability to process data and financial information related to the Financial Assessments Service  |
| **3.** | Experience of working in a fast paced environment, able to prioritise work to meet service requirements  |
| **4.** | Ability to understand and interpret national legislation, policies and guidance and to ensure processes remain compliant with national requirements  |
| **5.** | Full driving licence with the ability to travel to visit service users where appropriate  |
| **6.** | Ability to work with internal and external stakeholders, in particular vulnerable adults and their carers, to support the delivery of the Financial Assessments service  |
| **7.** | 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  |

Job Family

Professional/Technical

Grade E



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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 the experience and technical expertise of job holders enables them to carry out a range of complicated tasks and provide authoritative technical and procedural advice to colleagues and members of the public. They will monitor and take responsibility for a range of Council assets and will plan work outputs and project deliverables several weeks in advance.

### 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.

Usually job holders have been working within the specific field for a reasonable time and they have been exposed to many of the routine and more unexpected circumstances of their role.

This level is also appropriate for jobs requiring graduate or post graduate qualifications in a specific discipline, but which will not yet have the on the job experience necessary for full practitioner level expertise.

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

### Thinking, planning and communication

Job holders will need to make judgements and creative choices related to the tasks they carry out and the advice or guidance they give others. Problems are likely to crop up quite regularly and their solutions will come from both standard practice guidelines and reliance upon jobholders’ technical expertise in their particular discipline.

Job holders will deal with many day-to-day issues but will also be required to plan ahead several weeks ahead to achieve personal and team goals.

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 enjoy some autonomy in determining the best practical approach to meeting goals and targets. Although working in a team context where working to recognised procedures ensures consistency, they will need to respond independently to unexpected problems and situations, referring particularly unusual or difficult issues to a manager.

### Areas of responsibility

At this level, rather than provide a straightforward service to others, job holders will need to carefully assess their specific needs and tailor their response appropriately. Alternatively, some roles will be responsible for implementing regulations in such areas as public health, housing or democratic governance.

There will be no supervisory responsibility at this level, but job holders may assist with the orientation of new starters, volunteers or students.

OR:

Supervisory duties are an element of jobs but there will generally be a compensating reduction in the requirement to assess the needs of service users and/or accountability for financial and physical resources.

Given the diversity of jobs, the specific nature of responsibilities will depend upon the needs of the team. These are likely to be financial accountability at the level of regular cash handling or monitoring/ spending from an agreed budget and the careful use and maintenance of significant Council assets such as vehicles, equipment, information and resources.

### 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.

Many Professional / Technical 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 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.