

## Kent County Council

### Job Description: *Client Financial Services Officer*

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<b>Directorate:</b>	Strategic and Corporate Services
<b>Unit/Section:</b>	Finance, Client Financial Services
<b>Grade:</b>	KR7
<b>Responsible to:</b>	Client Financial Services Team Manager

#### **Purpose of the Job:**

Client Financial Services implement policies and legislation associated with the financial requirements of supporting clients known to Adult Social Care and Health. This role plays a key part in the provision of high-quality administrative financial support to customers, many of whom are vulnerable and have complex needs.

Client Financial Services consists of eight teams. This post will require you to work in one of the Assessment Teams.

A Client Financial Services Officer should provide a first-class customer service to colleagues within the Council and external customers of the Authority, handling customer enquires face to face, over the telephone, internet or email, giving information and resolving queries.

#### **Main duties and responsibilities:**

- Act as first point of contact for the team, handling customer enquiries effectively across a number of different services via telephone, email, written response and face to face meetings using highly developed communication and analytical skills. Signpost customers appropriately for further support as required e.g. Debt Management Advice, Department for Work and Pensions (DWP).
- Conduct financial assessments promptly and accurately to determine client contributions for care and support services and residential care services, including annual reviews in accordance with the Council's Charging Policies and the Care and Support Statutory Guidance. Communicate the outcome of the financial assessment ensuring clients and their representatives fully understand how their contribution has been calculated including how they are required to pay.
- Process Deferred Payment applications to determine eligibility, liaising with a range of stakeholders e.g. care home providers and legal services to ensure payments are made promptly, and debt to the authority is secured as a priority.
- Establish a customer's welfare and financial circumstances by sensitively challenging information provided. This may include safeguarding (financial abuse) and potential cases where deprivation of capital has occurred, making recommendations and reporting through the escalation process as appropriate.
- Complete financial reconciliations and analyse and interpret financial data.
- Deal sensitively and manage challenging situations with customers.
- Contribute towards the success of the Client Financial Services function by working towards individual and team targets, while maintaining an accurate, efficient and consistent method of working.

- Handle confidential and sensitive information in line with General Data Protection Regulation (GDPR) requirements.
- To undertake any other ad hoc responsibilities aligned with the overall purpose and grade of the role.

Footnote: This job description is provided to assist the job holder to know what their main duties are. It may be amended from time to time without change to the level of responsibility appropriate to the grade of post.

## Kent County Council

### Person Specification: *Client Financial Services Officer*

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The following outlines the criteria for this post. Applicants who have a disability and who meet the criteria will be shortlisted.

Applicants should describe in their application how they meet these criteria.

	CRITERIA
<b>QUALIFICATIONS</b>	<ul style="list-style-type: none"><li>• Educated to GCSE level 4 in English and Mathematics.</li><li>• Educated to A level or NVQ Level 3 in Business Administration or another relevant subject.</li></ul>
<b>EXPERIENCE</b>	<ul style="list-style-type: none"><li>• Experience of working with basic financial tasks.</li><li>• Experience of delivering service excellence to customers, with the ability to provide information and advice in a sensitive and understanding manner.</li></ul>
<b>SKILLS AND ABILITIES</b>	<ul style="list-style-type: none"><li>• A positive individual who engages well with colleagues and fosters excellent team spirit.</li><li>• Able to travel to different work locations when required. Willing and available to work flexibly across the opening hours of the service according to changing demand.</li><li>• Work on own initiative and as part of a team. Provide support and guidance, share experiences with colleagues.</li><li>• Ability to delivery in a target led environment.</li><li>• Understand and apply relevant policy and legislation.</li><li>• Demonstrate personal resilience when working in an environment of pressure and constant change.</li><li>• Able to effectively manage customer enquiries, adapting communication style as required.</li><li>• Ability to sensitively manage challenging situations and difficult conversations.</li><li>• Ability to build rapport and trust with a diverse range of customers and stakeholders in a professional and responsive manner.</li><li>• Ability to prioritise, be flexible and arrange workloads to meet targets, and respond effectively to face paced transformation.</li><li>• Ability to work professionally in conjunction with other public bodies e.g. Office of Public Guardian (OPG), independent financial advice and Department for Work and Pensions (DWP).</li><li>• Confidence to challenge existing ways of working and suggest ideas for improvement.</li><li>• Ability to analyse and interpret complex data, provide clear and accurate advice to customers regarding their individual situation.</li></ul>

<b>KNOWLEDGE</b>	<ul style="list-style-type: none"> <li>• Awareness of Kent County Council and awareness of the role of Adult Social Care within Local Government.</li> <li>• Working knowledge of Microsoft applications.</li> <li>• Detailed understanding of managing a client's finances.</li> <li>• Detailed knowledge and understanding of the General Data Protection Regulation (GDPR).</li> <li>• Awareness of the Care and Support Statutory Guidance (CASS).</li> <li>• Detailed understanding of current legislation i.e. Care and Support Statutory Guidance (CASS) impacting on Adult Social Care and an appreciation as to how this impacts across the Authority.</li> <li>• Detailed working knowledge of the welfare benefits.</li> </ul>
<b>BEHAVIOURS AND KENT VALUES</b>	<p><b>Kent Values:</b></p> <ul style="list-style-type: none"> <li>• We are <b>brave</b>. We do the right thing, we accept and offer challenge</li> <li>• We are <b>curious</b> to innovate and improve</li> <li>• We are <b>compassionate</b>, understanding and respectful to all</li> <li>• We are <b>strong together</b> by sharing knowledge</li> <li>• We are all <b>responsible</b> for the difference we make</li> </ul> <p>Our values enable us to build a culture that is:</p> <p><b>Flexible/agile</b> – Willing to take (calculated) risks and want people that are flexible and agile</p> <p><b>Curious</b> – Constantly learning and evolving</p> <p><b>Compassionate and inclusive</b> – Compassionate, understanding and respectful to all</p> <p><b>Working Together</b> – Building and delivering for the best interests of Kent</p> <p><b>Empowering</b> – Our people take accountability for their decisions and actions</p> <p><b>External Focused</b> – Residents, families and communities at the heart of decision making</p>