

Kent County Council

Job Description: Financial Assessment Officer

Directorate: Chief Executive's Department
Unit/Section: Finance Division / Financial Assessment & Income Unit
Grade: KR7
Responsible to: Financial Assessment & Benefits Team Manager

Purpose of the Job:

The Care Act 2014 provides a single framework for local authorities to charge for care and support. It enables a local authority to decide whether to charge a person when it is arranging to meet a person's care and support needs or a carer's support needs. The Act provides statutory guidance that the authority must adhere to. This post holder will be expected, on behalf of Adult Social Care, to complete with the client / representative a full and thorough financial assessment together with ensuring that the client / representative is aware of their full benefit entitlement. Each completed Financial Assessment must be in accordance with the Authority's charging policy. You will be responsible for quickly building rapport with people we support whilst calculating charges for care in a professional, diplomatic and supportive manner.

Main duties and responsibilities:

1. Provide the front-facing role for the accurate completion of financial assessments for people to establish how much they need to pay towards the cost of their care. You will make sure they fully understand how their contribution towards the cost of care and support has been calculated and how to pay.
2. Interpret information from other public agencies to support the accurate calculation of financial assessments.
3. Signpost customers appropriately for further information or support e.g., Debt Management and Welfare Benefit entitlement.
4. Work closely with other teams within the Financial Assessment & Income Unit and those supporting Adult Social Care.
5. Process Deferred Payment applications and prioritise securing debt to the authority.
6. Undertake the Council's statutory duties in relation to safeguarding vulnerable adults and their finances.
7. Proactively monitor and escalate complex accounts that require management review.
8. Any other duties and responsibilities within the range of the salary grade.

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.

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Person Specification: Financial Assessment Officer

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
Qualifications	• Educated to GCSE level 4 in English and Mathematics or equivalent.
Experience	• Experience of working within an administrative environment and/or front facing customer service. • Experience of working in a role providing financial advice and guidance to vulnerable people. • Experience in a financial environment e.g. Banking, Financial Reconciliations, Credit Control or Performance Monitoring. • Previous experience of working within a finance function, using a range of financial systems.
Skills and Abilities	• Excellent analytical, accuracy, numeracy, and calculation skills. • Excellent Customer Service skills and confident telephone manner. • Ability to maintain confidentiality at all times. • Ability to take a methodical and analytical approach. • Ability to understand the requirements of accurate receipting. • Excellent IT skills in Microsoft Office. • Good organisational skills and time management skills. • Positive individual who engages well with colleagues and fosters excellent team spirit. • Ability to deliver in a target led environment, prioritise and work to deadlines. • Ability to converse professionally with individuals at all

	levels of seniority and from different disciplines. • Understand and apply relevant policy and legislation. • Able to effectively manage customer enquiries, adapting communication style as required. • Ability to sensitively manage challenging situations and difficult conversations. • Ability to analyse and interpret complex data, provide clear and accurate advice to customers regarding their individual situation. • Ability to travel across a wide geographical area in a timely and flexible manner, in accordance with the needs of the service.
Knowledge	• Awareness of the General Data Protection Regulation (GDPR) and information handling and sharing. • Awareness of the authority's debt recovery policy. • Knowledge of welfare benefits system. • Knowledge surrounding the charging arrangements for those clients known to Adult Social Care • Knowledge of safeguarding the financial affairs of vulnerable people.
Kent Values and Cultural Attributes	Kent Values: • We are brave. We do the right thing, we accept and offer challenge • We are curious to innovate and improve • We are compassionate, understanding and respectful to all • We are strong together by sharing knowledge • We are all responsible for the difference we make Our values enable us to build a culture that is: • Flexible/agile – Willing to take (calculated) risks and want people that are flexible and agile • Curious – Constantly learning and evolving • Compassionate and inclusive – Compassionate, understanding and respectful to all

	• Working Together – Building and delivering for the best interests of Kent • Empowering – Our people take accountability for their decisions and actions • External Focused – Residents, families and communities at the heart of decision making.
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