

## Kent County Council

### Job Description: *Client Financial Services Officer (KR7)*

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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.

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- 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 his/her 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: *Client Financial Services Officer (KR7)*

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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 minimum GCSE level 4 in English and Mathematics.</li><li>• Educated to minimum 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>

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<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>• <b>We are brave. We do the right thing, we accept and offer challenge</b></li> <li>• <b>We are curious to innovate and improve</b></li> <li>• <b>We are compassionate, understanding and respectful to all</b></li> <li>• <b>We are strong together by sharing knowledge</b></li> <li>• <b>We are all responsible for the difference we make</b></li> </ul> <p><b>Open</b></p> <p><b>Invite Contribution and Challenge</b></p> <p><b>Accountable</b></p> <p>And</p> <p><b>Exhibit the Finance behaviours of:</b></p> <ul style="list-style-type: none"> <li>• Make it Happen</li> <li>• Commercial Perspective</li> <li>• Water for Growth</li> <li>• Break the Barriers</li> <li>• Be Kind</li> </ul>

## Kent Values and Corporate Finance Behaviours

### Kent Values required of all staff:

#### Be Open

- Act with integrity, honesty and transparency.
- Demonstrate a health attitude to risk.
- Welcome and expect change and evolving technology.
- Work in new ways.
- Be willing to learn.
- Work as a whole council.
- Treat people fairly and with respect.

#### Invite contribution and challenge

- Work collaboratively to find new solutions.
- Innovate.
- Put the interests and wellbeing of customers first.
- Be open to challenge.
- Actively encourage and expect contribution.

#### Accountable

- Do more for yourself.
- Take personal and professional responsibility for your actions and performance.
- Deliver at pace.
- Look for ways to save money.
- Look for commercial opportunities.
- Focused on outcomes.

### Exhibit the Corporate Finance behaviours of:

We all need to take a step back and think about our own wellbeing and the wellbeing of those around us.

**'Be Kind'** is a reminder that we are One Finance and with everything that we do, there is never a reason to not be kind!

- Take notice of those around you and Ask Twice if someone is acting differently.
- Eat well and be active.
- Give – do something nice for a colleague.
- Value one another.
- Don't suffer in silence! You are never alone.
- Kindness and looking out for each other cost us nothing.
- Help a person in need, a problem shared is a problem halved.

In a large organization you can sometimes feel alone. Whatever problem you are facing, in Finance

- Embrace new technologies and ideas.
- Offer and accept help.
- If you are an expert in your field, share your knowledge.

<p>we strive to tackle them together.</p> <p>By offering our combined knowledge, skills and help, we can <b>Break</b> down any <b>Barriers (Break the Barriers)</b> in any way</p>	<ul style="list-style-type: none"> <li>• Challenge the way we work, is there a better way?</li> <li>• Get people involved and co-operate across teams.</li> <li>• All ideas and points of view are worthwhile.</li> </ul>
<p><b>Commercial Perspective</b> isn't just about saving money! It is about being business like in our approach to both colleagues and customers.</p> <p>Ask yourself this, would you always act the same way if KCC was your own business?</p>	<ul style="list-style-type: none"> <li>• Treat every £ as it is was your own.</li> <li>• Put the customer at the heart of every decision.</li> <li>• If it doesn't add value, why are we doing it?</li> <li>• Continually improve our systems and processes.</li> <li>• Seek opportunities to generate income for KCC.</li> <li>• Listen to and act on customer feedback promptly.</li> </ul>
<p>There is always a time when you just need to get the job done. <b>Make it Happen</b> is the behavior that takes you across the finish line and avoids stopping when things get difficult.</p> <p>A positive mindset will more often than not lead to positive results!</p>	<ul style="list-style-type: none"> <li>• Don't put off tomorrow what you can do today.</li> <li>• Everyone can lead by example not just management.</li> <li>• Be a 'first follower', people will join you!</li> <li>• Use initiative to seek solutions for problems, without being asked.</li> <li>• Don't let work go undone because its 'not my job', find out who's it is.</li> <li>• It you go the extra mile, in KCC finance we will recognize this.</li> </ul>
<p>In Finance we want you to reach your potential but not overburden you to the point that you start to sink.</p> <p><b>Water for Growth</b> is about bringing everybody on, not just the select few, so that we feel ready to take on the next challenge.</p>	<ul style="list-style-type: none"> <li>• Don't blame others, if someone makes a mistake help them learn from it.</li> <li>• Give your staff the space and time to develop.</li> <li>• Look out for and support those who are overstretched</li> <li>• Provide equal opportunities.</li> <li>• Actively seek tasks that take you out your comfort zone.</li> <li>• Give positive feedback for a job well done or even 'fantastic failures'.</li> </ul>

