Job Title: Financial Assessment Officer   
Grade: 8

GRADE xx

Our Vision

We have a clear vision for Staffordshire - an innovative, ambitious and sustainable county, where everyone has the opportunity to prosper, be healthy and happy

Our Outcomes

We want everyone in Staffordshire to:

* Have access to more good jobs and share the benefit of economic growth
* Live in thriving and sustainable communities
* Be healthier and more independent for longer

Our Values

Our People Strategy sets out what we all need to do to make Staffordshire County Council a great place to work, where people are supported to develop, the Strategy to ensure that the focus is on what is important to the organisation and the people it serves:

* Ambitious – We are ambitious for our communities and citizens
* Courageous – We recognise our challenges and are prepared to make   
  courageous decisions
* Empowering – We empower and support our people by giving them   
  the opportunity to do their jobs well.

About the Service

ACFS support the delivery of the following Staffordshire County Council priorities:

• To offer support at times of crisis to help people maintain their independence

• That people know what to expect from care services, who is eligible and who will pay

• There are quality and affordable care services available to meet people’s needs

Adult and Children's Financial Services (ACFS) are a pivotal part of the Adult and Children Social Care Pathways, responsible for facilitating and overseeing the payment to providers of Adult and Children’s Social Care and for the collection of client contributions in accordance with Care Act 2014 and local policy. The amount of income and expenditure that is processed by ACFS is in excess of £100m net per annum and the service supports circa 10,000 citizens.

To enable the successful collection of income, ACFS is responsible for undertaking means tested Financial Assessments of adults who have an assessed eligible care need. This also applies to those who are seeking financial support to Adopt, Foster or provide Guardianship or other official support to a child. As part of this service clients can receive advice on Welfare and Benefit entitlements, to ensure they maximise their income and reducing the funding required from SCC.

ACFS contribute to the wider county council priorities and principles which are:

Priorities:

• Help Staffordshire’s economy to grow and generate more good jobs

• Invest in infrastructure for growing communities

• Improve education and training so that life-long learning offers everyone the opportunity to succeed

• Inspire healthy, independent living

• Support more families and children to look after themselves, stay self and well

Principles:

• Encourage residents and communities to help themselves and one another

• Our workforce will be ambitious for Staffordshire, and make a difference for our people

• Be digital, using technology and data to connect, inform and support our citizens

• Think climate change in all we do to limit our impact on the planet

Reporting Relationships

Responsible to: ACFS Senior Finance Officer

Responsible for: No Direct Reports

Key Accountabilities:

1. Responsible for conducting Financial Assessments for all care types (Means Tests) of Citizens seeking funding from Adult Social Care and Parents and Guardians seeking financial support for Adoption, Fostering and Special Guardianship in face-to-face settings and over the telephone or digitally. Responding to queries and assisting in appeals relating to Financial Assessments
2. Review, and where appropriate challenge, evidence provided in relation to a citizens’ financial information ensuring all information is collected and accurate
3. Responsible for conducting annual Financial Reviews ensuring appropriate notifications are issued for changes to client contributions with a clear rationale for the citizen or financial representative
4. Responsible for the provision of relevant information, advice and guidance on Welfare Benefits to Citizens, to maximise individual benefit entitlement and assist with benefit applications (where appropriate)
5. Responsible for ensuring assessments and the provision of advice and guidance follow national guidance and legislation as set out in the Care Act 2014 and Staffordshire County Council policy, in order that the service continues to apply the latest practice
6. Accountable for providing advice, guidance and information to citizens / financial representatives relating to deferred payment agreements, ensuring information is obtained to facilitate and support the timely completion of applications, and adheres to national / local policy and procedure.
7. To follow business processes and procedures for the role and to interpret and enact all policy and statutory requirements relating to the role.
8. To ensure consistent, high quality record keeping ensuring a clear audit trail of Financial Assessment calculations, communications and decision making
9. Responsible for liaising with key corporate functions (i.e. legal services) to enable swift progress on Financial Assessments and Deferred Payment Agreements
10. To liaise with external organisations, in particular other Social Care organisations, the NHS and DWP to progress financial assessments accurately and in a timely manner
11. Ensuring communications with citizens and / or representative are appropriate and sensitive throughout the financial assessment process
12. Responsible for ensuring that work activities meet the relevant Key Performance Indicators for the service.
13. To provide training and/or awareness sessions relating to financial assessments and deferred payment agreements to key stakeholder groups, internally and externally
14. To provide operational support to ACFS Senior Officers and other colleagues as required.

Professional Accountabilities:

The post holder is required to contribute to the achievement of the Council objectives through:

**Financial Management**

Personal accountability for delivering services efficiently, effectively, within budget and to implement any approved savings and investment allocated to the service.

**People Management**

Engaging with People Management policies and processes

**Equalities**

Ensuring that all work is completed with a commitment to equality and anti-discriminatory practice, as a minimum to standards required by legislation.

**Climate Change**

Delivering energy conservation practices in line with the Council’s climate change strategy.

**Health and Safety**

Ensuring a work environment that protects people’s health and safety and that promotes welfare, and which is in accordance with the Council’s Health & Safety policy.

**Safeguarding**

Commitment to safeguarding and promoting the welfare of vulnerable groups.

The content of this Job Description and Person Specification will be reviewed on a regular basis.

**Person Specification**  A = Assessed at Application

I = Assessed at Interview

T = Assessed through Test

|  |  |  |
| --- | --- | --- |
| **Minimum Criteria for Disability Confident**  **Scheme\*** | **Criteria** | **Measured by** |
| **employer_small** | **Qualifications**   * NVQ Level III or equivalent qualification – e.g. business and administration; or relevant experience | A |
| **employer_small**  **employer_small** | **Knowledge and Experience**   * Proven and demonstrable experience of working in the public sector, third sector or a financial function * Experience of conducting financial assessments, gathering relevant information and querying evidence provided so that the right outcome is achieved * Experience of utilising, inputting and interrogating records into corporate ICT applications and systems * Experience of working under pressure in a busy environment. * Working knowledge of financial processes, financial systems and/or the UK Welfare Benefits system. * An understanding of how charges for Care are calculated in accordance with the Care Act 2014. * Ability to implement legislation, process and departmental procedures. | A/I  A/I  I  I  A/I  A/I  A/I |
| **employer_small**  **employer_small** | **Skills**   * Numeracy and analytical skills with the ability to carry out detailed analysis work. * Ability to create and use spreadsheets, word processing documents, financial systems and e-mail. * Excellent verbal and written communication skills with the ability to liaise effectively with staff at all levels and with members of the public. * Excellent time management skills with an ability to work under pressure to meet deadlines and on own initiative. * Ability to empathise and see things from other individuals’ perspectives. * Excellent interpersonal skills with the ability to develop effective working relationships and promote good customer care. This includes fostering good working relationships within the team, directorate, other directorates and external agencies. * Ability to plan and organise own work without supervision * Ability to produce accurate and quality-controlled work * Flexible, ‘can do’ approach – demonstrating ability to respond positively to changes in allocation of work at short notice to set deadlines. * A commitment to equal opportunities and anti-discriminatory practice and to work with a diverse customer base. | A/I/T  I  A/I/T  I  I/T  A/I/T  I  I  I  A/I/T |

This post is designated as a casual car user

**employer_small** If a disabled person meets the criteria indicated by the Disability Confident scheme symbol and provides evidence of this on their application form, they will be guaranteed an interview.

We are proud to display the Disability Confidence Symbol, which is a recognition given by Job centre plus to employers who agree to meet specific requirements regarding the recruitment, employment, retention, and career development of disabled people.

If you need a copy of this information in large print, Braille, another language, on cassette or disc, please ask us by contacting **Liberata Employee Services Team on 01905 947446**

**Shared Services on 01905 947446**