

Job Description

Financial Assessments and Benefits Coordinator

Reference: FO46

Date: January 2026

Job Family:	Finance / Receivables, Payments and Assessments
Level:	1
Band:	4
Career Track:	Operational

Job Purpose

To provide an effective financial administration service by processing financial assessments, client and provider payments, charges, placement agreements, audits and debt recovery information in line with procedures and financial timescales. Responds to enquiries from clients, providers and staff by offering accurate advice and support, and contributes to the smooth running of the team through reliable assistance to senior colleagues.

Service Purpose

The Services are responsible for the delivery of Commissioning activity in line with the Council wide Strategic Commissioning Framework, underpinned by Category Management. The service is responsible for ensuring statutory duties for commissioning, market shaping, sufficiency, diversity, contract management and quality assurance are met across children and adult social care. The service also has responsibility for governance, performance, systems and finance across the adult's directorate ensuring management is supported by accurate and timely finance and performance information and that statutory returns are reported timely and accurately.

Duties and Responsibilities

Communication and Liaison

- Provide and receive routine, complex and sensitive information using tact and persuasion.
- Communicate with a wide range of internal and external stakeholders on adult social care financial matters.
- Explain financial regulations and NCC/NHS rules in simplified terms to non-finance colleagues and clients.
- Handle sensitive financial queries from staff, clients and providers, including issues relating to payments or charges.

Financial Analysis and Problem Solving

- Analyse and interpret financial assessments, payments, receipts and returns.
- Investigate financial queries and analyse data to identify discrepancies and errors.

- Carry out complex financial calculations and determine actions for overpayments, underpayments or debt recovery.
- Identify issues from financial data and select the most appropriate solution from available options.
- Monitor individual placement agreements and determine when further action is required.

Planning, Organisation and Administration

- Plan and organise workload to meet financial and performance deadlines.
- Maintain administrative systems, including mail handling and file updates, to support the team.
- Assist with diary and appointment management for Financial Assessment and Benefits Officers.
- Complete and update paperwork relating to financial assessments and benefits processes.

Policy, Service Development and Compliance

- Implement policies and procedures and propose improvements to working practices.
- Undertake required surveys, audits and data collection activities within own work area.

Person Specification

Professional and Technical Requirements

Qualifications

- GCSEs (or equivalent) including English and Mathematics.
- Financial skills acquired through NVQ Level 3, AAT Intermediate Level or equivalent experience.
- ECDL or equivalent IT competence.

Knowledge, Experience and Skills

- Recent experience in a financial or administrative role.
- Strong knowledge of Microsoft Office, with the ability to produce accurate reports and documents.
- Well-developed financial, administrative and analytical skills.
- Ability to input, manipulate and interpret financial data with accuracy and attention to detail.
- Experience using databases and spreadsheets for financial processes such as assessments, provider rates or placement agreements.
- Ability to work independently, organising workload to meet strict financial and performance deadlines.
- Ability to maintain confidentiality and work within established policies and procedures.
- Advanced keyboard skills and efficient use of digital systems.
- Effective problem-solving skills when dealing with financial or administrative issues.

Core Competency Requirements

- **Communication:** Communicates clearly and respectfully to support shared understanding. Uses active listening to confirm meaning and respond appropriately.
- **Collaboration:** Works with others to complete tasks and support service delivery.
- **Service Delivery:** Delivers tasks to expected standards and timescales, following procedures and guidance. Uses resources efficiently to support effective delivery.

- **Decision-Making:** Makes decisions using guidance and procedures.
- **Digital and Data Literacy:** Uses standard digital tools to complete work, following guidance on data protection and digital safety.
- **Adaptability:** Adapts to change and feedback. Applies learning to improve own work and support team outcomes.
- **Problem-Solving:** Resolves issues using known solutions.
- **Community and Customer Focus:** Delivers services with care and respect, considering diverse needs and ensuring a positive customer experience.
- **Leadership:** Supports colleagues and takes responsibility for own work.

Strengths

- **Analytical:** You seek and analyse information to inform your decisions, based on the best available evidence.
- **Precise:** You concentrate on detail and make sure everything is accurate and error free.
- **Explainer:** You communicate thoughts and ideas, verbally or in writing. You simplify complexities and adapt communication so others can understand.
- **Organiser:** You make plans and are well prepared. You seek to maximise time and productivity.
- **Service focused:** You look for ways to serve customers putting their needs at the heart of everything you do.

Desirable

- Knowledge/experience of financial processing relating to charging within Adult Social Care E.g. Direct Payments Funding; Financial Assessments, Welfare Benefits etc.
- Knowledge & experience of Direct Debit process.
- Working knowledge of Oracle E Business.
- Knowledge of the Care Act 2014.