

Northumberland County Council

JOB DESCRIPTION

Post Title: Financial Assessments and Benefits Officer	Director/Service/Sector: Adult Social Care: Finance, Systems and Information Services		Office Use
Band: 7	Workplace: County Hall, Morpeth. Eddie Ferguson House, Blyth. Fenkle Street, Alnwick.		JE ref: 3955
Responsible to: Finance Service Manager	Date: 21/062021	Job Family:	
Job Purpose: To be a member of the Adult Social Care Finance Team within Financial Assessments and Benefits Team. To identify and support the collection of the correct charge payable by clients in receipt of community based services and residential care services. Ensures financial information is processed in accordance with procedures, in order to provide information for statutory returns, through completion of own work and through the coordination of the work of others.			
Resources	Staff	Accountability for the leadership of post holders staff / teams / departments; They do not conduct appraisals or supervisions however they act as mentors and support apprentices in the team. They also assist in training new staff.	
	Finance	Authorised signatory; contributes to formulation of section budgets, internal budgets. May collect cash/important documents from clients/empty properties. They may support clients to go to banks or similar institutions to sort out financial issues.	
	Physical	Office Conditions – Uses keyboard for significant proportion of the day.	
	Clients	Provide non-clinical advice, information to patients, clients, relatives. Advise patients/clients regarding e.g. assessments They have responsibility for treating all information they gather confidentially and stored securely. They have a duty of care to all clients they come into contact with and need to treat clients and their families with empathy and understanding in often difficult circumstances.	
Duties and key result areas:			
Communications and Relationships:			
<ul style="list-style-type: none"> • Provide and receive complex, sensitive information, persuasive, motivational, negotiating, training skills are required • Discusses financial queries with staff, providers, clients, client/service user representatives and outside organisations in relation to financial assessment and welfare benefits, which are often complex and include sensitive issues (e.g. financial income, identifying where clients are eligible for LA contracts for residential and nursing home placements). Discusses financial issues with clients, which may be contentious provides advice on complex financial and corporate issues to non-financial managers, negotiates with internal and with external organisations over cost, service issues (e.g. discussing / agreeing amounts where third party top ups are required for placements). 			
Knowledge, Skills, Training and Experience:			
<ul style="list-style-type: none"> • Expertise within a specialism, underpinned by practical experience • Experience and expertise in a range of accounting areas (e.g. assessment, financial review, finance computer systems and ledgers and coding structures). • Knowledge of legislation as it affects own finance area, acquired through professional accountancy qualifications – Certificate Level/Association of Accounting Technicians (AAT) Member or equivalent experience to degree level • To lead, inspire and motivate others to high performance by agreeing clear goals and objectives, providing support and guidance and creating opportunities for development • To contribute to the development of a culture of high engagement, where staff are empowered and entrusted to provide the best services and care for patients • To promote and facilitate innovation and continuous improvement to deliver better services for service users and patients • Accountability for the leadership of post holders staff / teams / departments 			
Analytical Skills:			
<ul style="list-style-type: none"> • Complex facts or situations requiring analysis, interpretation and comparison of a range of options • Analyses financial data. Analyses, investigates and resolves financial queries and discrepancies 			

Planning & Organisational Skills:

- Plans and organises straight forward tasks, some ongoing.
- Plans workload to ensure weekly, monthly, quarterly, and annual financial timetables are met /undertakes staff or complex work planning

Physical Skills:

- Developed physical skills, advanced keyboard use
- Inputs and manipulates financial data into computer databases and spreadsheets, where speed and accuracy are necessary

Policy & Service Development:

- Implement policies and propose changes to work practices, procedures for own area
- Proposes changes to working practices and procedures e.g. when planning for the impact of new legislation and implements plans in own area/proposes changes to and redesigns local accounting and financial policies and procedures which have an impact in other areas.

Human Resources:

- Day to day coordination of staff: provide practical training
- Coordinates the work of more junior staff in the section, delivers finance training to non-finance managers.

Information Resources:

- Regular requirement to develop or create reports, documents, drawings.
- Designs, formats financial spreadsheets and databases

Research & Development:

- Undertakes surveys or audits as necessary to own work.
- Conducts complex audits to improve finance and accounting services.

Freedom to act:

- Clearly defined occupational policies, work is managed rather than supervised.
- Works within the policies and procedures, work is managed not supervised.

The duties and responsibilities highlighted in this Job Description are indicative and may vary over time. Post holders are expected to undertake other duties and responsibilities relevant to the nature, level and extent of the post and the grade has been established on this basis.

Work Arrangements

Transport requirements:

Travel to work sites, area offices, meetings or other venues throughout the County and region and further afield on occasion.

Working patterns:

May include weekends and evenings. Mainly office based but some travel required.

Working conditions:

Mainly indoors. Occasional exposure to working outdoors.

Northumberland County Council
PERSON SPECIFICATION

Post Title: Financial Assessments and Benefits Officer	Director/Service/Sector: Adult Social Care: Finance, Systems and Information Services	Ref: 3955
		Assess by
Qualifications and Knowledge		
<ul style="list-style-type: none"> • Degree and/or equivalent specialist knowledge of Financial Assessments and/or welfare benefits, acquired through courses and experience • Knowledge of: Mental Capacity Act 2005 & Care Act 2014 		
Experience		
<ul style="list-style-type: none"> • Significant recent, relevant experience in a financial role. • Evidence of analytical skills with the ability to collect, interpret and present data clearly • Public Sector Administration Procedures, Financial Management and Budgetary Procedures 		
Skills and competencies		
<ul style="list-style-type: none"> • Ability to work independently, to organise own workload to meet strict financial deadlines • Strong finance, analytical, organisational and problem-solving skills • Ability to work within a clear policy of confidentiality • Excellent communication skills, able to communicate confidently, sensitively and effectively with people at all levels and to demonstrate experience of communicating with vulnerable people • Excellent skills in MS office with ability to produce own reports and documents • Commitment to working as part of a Team • A calm and even temperament and tactful and diplomatic as dealing with sensitive issues • Commitment to self-development • Flexible and adaptable to change • Motivated and committed to providing a high standard of service • Excellent interpersonal skills. • Ability to work to challenging deadlines • To lead, inspire and motivate others to high performance by agreeing clear goals and objectives, providing support and guidance and creating opportunities for development • To contribute to the development of a culture of high engagement, where staff are empowered and entrusted to provide the best services and care for patients • To promote and facilitate innovation and continuous improvement to deliver better services for service users and patients 		

<ul style="list-style-type: none"> Accountability for the leadership of post holders staff / teams / departments 		
Physical, mental, emotional and environmental demands		
<p>Physical: Combination of sitting, standing, walking/ Frequent requirement for sitting or standing in a restricted position – light physical effort / inputs at a keyboard for most of the day Property checks to comply with insurance cover and compiling inventories. Delivering and issuing court of protection documentation to clients in care homes. Some home visits are required to carry our financial assessments and/or making benefit claims.</p> <p>Mental: Frequent concentration, work pattern predictable occasional prolonged concentration – Concentration required when inputting data, checking and reconciling information, making calculations and when answering queries from staff, customers/may be required to switch tasks requirement to concentrate for long periods when inputting data and when analysing data, statistics</p> <p>Emotional: Occasional exposure to distressing or emotional circumstances In dealing with family financial and care circumstances</p> <p>Go out and about conducting financial assessments for clients who are not able to have a telephone assessment because of physical or mental impairment driving throughout the county. Visit properties for insurance checks. Deliver court paperwork to clients. Visit clients to make benefit claims. Have to deal with clients and families who can be verbally abusive on the telephone or in person. Can find themselves in unpleasant environments ie dirty/smelly houses/incontinent clients/hoarders.</p>		
Other		
Able to meet the transport requirements of the job		

Key to assessment methods; (a) application form, (i) interview, (r) references, (t) ability tests (q) personality questionnaire (g) assessed group work, (p) presentation, (o) others e.g. case studies/visits