

Northumberland County Council

JOB DESCRIPTION

Post Title: Finance Officer	Director/Service/Sector:		Office Use
Band: 4	Workplace: Adult Social Care: Finance, Systems & Information Services		JE ref: HRMS ref:
Responsible to: Finance Team Manager	Date: September 2021	Manager Level:	
Job Purpose:			
<ul style="list-style-type: none"> Ensures financial assessments, payments to providers/collecting payments from clients, calculating charges, generating individual placement agreements, monitoring, payment audits and debt recovery information is processed in accordance with procedures and in order to provide information for statutory returns. Investigates enquiries and queries from clients, providers and staff and provides assistance and advice as required. Ensures that work is completed in line with financial timescales Advise clients regarding e.g. assessment, payment, debt information Supports senior colleagues and contributes to the smooth running of the team(s) by providing an effective financial administration service. 			
Resources	Staff	<ul style="list-style-type: none"> Demonstrate own activities to new or less experienced employees / Day to day coordination of staff / provide practical training Demonstrates activities, work routines to others in own work area / allocates to more junior staff in the section, provides induction training for trainees or new members of staff 	
	Finance	<ul style="list-style-type: none"> Handles Cash, valuables; authorised signatory Handle cheques received into the department for payment. Take payments over the telephone from clients and/or their financial agents. Raise and issue invoices and setting up direct debit payments for care charges and monitoring these payments. Ensuring new direct payments are set up and issued promptly and accurately and all payments are made by set deadlines 	
	Physical	<ul style="list-style-type: none"> Ensuring audit information is requested at the appropriate time Collection of overpayments / process refunds Safe keeping of client's property keys on behalf of Deputyship Team Data entry, text processing, storage of data, occasional requirement to develop or create reports, documents, drawings Inputs financial data into computerised and paper databases/systems; creates financial spreadsheets and word documents (e.g. maintain Adult Social Care Client Information System to ensure accuracy, completing documentation (paper and computer based) 	
	Clients	<ul style="list-style-type: none"> Assists patients / clients during incidental contacts / provide non clinical advice, information to patients / clients / relatives Gives advice and information to clients, their families and Care Management eg with respect to financial assessments, client charges, welfare benefits, debt, provider payments, appointments and individual placement agreements 	
Duties and key result areas:			
<ul style="list-style-type: none"> To be a member of the Adult Social Care Finance Team within: Assessments or Payments, Charging & Governance. 			

Communication & Relationships

- Provide and receive routine information requiring tact or persuasive skills; provide and receive complex or sensitive information
- Communicate and liaise with a wide variety of people at all levels verbally and in writing including internal and external (eg. clients, care providers, care managers, senior management, payroll agencies, financial agents, DWP, other government departments and legal services) on adult social care financial issues
- Complete necessary paperwork, updating and progressing information about the financial assessment and benefits work and dealing with any resulting enquiries from service users
- Discuss queries from staff, clients and providers where there may be issues about non-payment, incorrect or late payments, change to charges or other sensitive issues
- Communicate statutory financial regulations and NCC/NHS rules in a simplified form to non-finance people, discuss complicated financial matters e.g. concerning invoices, payment, financial assessments and client contribution

Analytical Skills

- Judgments involving facts or situations, some requiring analysis / range of facts or situations requiring analysis
- Analyses, interprets and monitors financial assessments, payments, receipts and returns
- Investigates financial or financial process queries and analyses detailed data to identify errors and discrepancies
- Carries out detailed financial calculations/analysis
- Analyses financial data to identify errors and sorts out problems from a range of options
- Makes complex financial calculations and decides how to pursue over / under payments or debt recovery
- Monitor return of individual placement agreements and use own judgment in situations where further action is required

Planning & Organisation

- Plans and organises straightforward tasks some of which may be ongoing
- Plans workload to ensure weekly, monthly, quarterly and annual financial, business and performance timetables are met
- Establish and maintain effective administrative systems to support the work of the Financial Assessment and Benefits Officer Teams e.g. dealing with incoming and outgoing mail and file updating
- Assist with managing Financial Assessment and Benefits Officer diaries and appointments

Policy & Service Development

- Implements policies and proposes changes to working practices for own area
- Proposes changes to working practices and procedures (e.g. when planning for the impact of new legislation), implements procedures set by others

Research and Development

- Undertakes surveys or audits as necessary to own work
- The post holder will complete where required, eg staff surveys, audits.

Freedom to Act

- Standard operating procedures, someone available for reference/clearly defined operational policies, work is managed rather than supervised
- Works within set routines with little direct supervision but with advice available when required/works within policies and procedures and refers to manager when necessary

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.

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PERSON SPECIFICATION

Post Title:	Director/Service/Sector:	Ref:
Essential	Desirable	Assess by
Qualifications and Knowledge		
<ul style="list-style-type: none"> ▪ Minimum of 4 GCSEs, or equivalent, including English and Mathematics & Financial Skills acquired through NVQ Level 3, Association of Accounting Technicians Intermediate Level or equivalent experience ▪ European Computer Driving Licence (ECDL) or equivalent experience. 		
Experience		
<ul style="list-style-type: none"> ▪ Recent experience in a financial / administrative role ▪ Experience of Microsoft Office 	<ul style="list-style-type: none"> ▪ 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 	
Skills and competencies		
<ul style="list-style-type: none"> ▪ Ability to work without close supervision and to organise own workload to meet strict financial deadlines ▪ Well developed finance, administrative and analytical skills ▪ Ability to work within clear policy of Confidentiality ▪ Ability to communicate confidently, sensitively and effectively ▪ Excellent skills in MS office with ability to produce own reports and documents ▪ Developed physical skills; advanced keyboard use ▪ Inputs and manipulates financial data into computer databases and spreadsheets, where speed and accuracy are necessary e.g. financial assessments, provider rates, generating individual placement agreements, recording contact notes in databases/systems 		
Physical, mental, emotional and environmental demands		

<ul style="list-style-type: none"> • Frequent requirement for sitting in a restricted position • Inputs at a keyboard for most of the day • 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 and clients / occasional requirement to concentrate for long periods when inputting data and when analysing data / statistics • Occasional exposure to distressing or emotional circumstances in dealing with family financial and care circumstances • Use VDU more or less continuously • Use keyboard continuously for substantial proportion of the day 		
Motivation		
<ul style="list-style-type: none"> ▪ Commitment to working as part of a Team ▪ A calm and even temperament and tactful and diplomatic as dealing with sensitive issues ▪ Willingness to undertake any appropriate training and development as required for the role ▪ Flexible and adaptable to change ▪ Motivated and committed to providing a high standard of service ▪ Excellent interpersonal skills ▪ Ability to work to challenging deadlines 		
Other		

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