

Job Profile comprising Job Description and Person Specification

Job Description

Job Title: Financial Assessment Officer	Grade: Scale 5 – SO2
Section: ASCPH Finance - Business Resources	Directorate: Adult Social Care and Public Health
Responsible to following manager: Team Leader – Financial Assessments	Responsible for following staff:
Post Number/s:	Last review date:

Working for the Richmond & Wandsworth Better Service Partnership

We're Richmond & Wandsworth Better Service Partnership, the shared public service team for Richmond and Wandsworth Councils. Like any local authority, our role is to deliver the agenda of our elected members on behalf of the people who live and work in our part of the world. We deliver key services to our communities including social care, public health, children's services, housing and regeneration and environmental and community services.

Our joint workforce creates efficiency and resilience by bringing more creativity to the way we work, more objectivity and adaptability too, helping us deliver better services for all our residents.

We're here to help our communities thrive in a changing world, and to be there for the people who need us most we believe we need to keep adapting. That's why, at Richmond & Wandsworth Better Service Partnership, you'll be at the forefront of innovation in local government, and we'll invest in you and offer you opportunities to grow in a way only our unique organisation can.

Job Purpose

To complete timely and accurate financial assessments and invoices and maintain a deferred payment scheme for Adult Social Care and Public Health directorate adult service users.

Specific Duties and Responsibilities

- To carry out financial assessment calculations for people receiving adult social services and to calculate contributions towards their personal budget or care service communicating this to service users and ensuring accurate invoices are raised on a timely basis.
- To ensure that all details are accurately recorded on relevant IT systems (Mosaic) and statistical/management information is provided as and when required and according to deadlines and timescales. Deal with technical aspects of Mosaic and integra interface, resolving problems and ensuring all routines are completed on time, to standard and reconciled.
- To review information specifically to identify entitlement to state benefits, pensions, evidence of any potential financial abuse and deprivation of assets and then to make referrals as appropriate e.g. Welfare benefits advice service, client affairs team, care team, line manager etc.
- To respond to general enquiries from service users and representatives about financial assessments, invoices and charging policy by phone, letter and face to face meetings. Ensuring that the SSA's standards for these are always met.
- To ensure that the services for both Councils are dealt with on an equitable basis to deliver the standards required for each, as agreed annually by the Executives of both Councils.
- Providing advice and support to the service area on matters of Council's care charging policy including to advise and support managers on basic enquiries relating to the service.
- To contribute as required to performance review and improvement measures on an ongoing basis, helping to ensure that a customer focus is embedded within the function and innovative and creative solutions are evaluated to securing the highest quality and value for money function.
- To work as required in ways that develop good working relations and collaborative arrangements with internal and external stakeholders.
- To ensure that accurate invoices are raised according to deadlines to maximise the collection of income to the Council including financial assessments and billing processes, annual uplift of financial assessments.

- To provide finance information to service users or their representative including assessment breakdowns and statements.

Progression to Scale 6:

- To be fully competent at carrying out the duties required at Scale 5, with minimum supervision and to be able to carry out financial assessments for more than one area of the team's work including adults residential or non-residential care financial assessments
- To respond to enquiries from service users and representatives about financial assessments, invoices and charging policy by phone, letter and face to face meetings, with minimal supervision and ensuring that the SSA's standards for these are always met.
- To provide advice and training to internal staff on all financial assessment matters when required including adult social care reform.
- To investigate and draft responses to complaints and queries about charging and financial assessments, with some level of supervision in formulating the response.

Progression to SO1:

- To be fully competent at carrying out all aspects of the team's work with limited supervision.
- To provide training and coaching to new team members when required.
- To update the Directorate's public information material when required such as booklets and leaflets.
- To be responsible for the maintenance and updating of all online based material for the team, particularly changes associated with the new financial year and amendments to charging policy.
- To be responsible for investigating, timelining and responding to complaints and queries about charging and financial assessments, with minimal assistance from line managers apart from the most complex cases.
- To be responsible for collating information to assist with preparing deferred payment applications, third party top-up cases and cases with capital or property and care charging appeals. Meeting with applicants either virtually or in person when necessary.
- To support the council's legal team in gathering appropriate documents to support the placing of security over properties.

Progression to SO2:

- Undertake all the above tasks without supervision / input from line managers

- Take responsibility for complex casework including independent decision making and thorough knowledge of treatment of trust funds, inheritance and life insurance policies within the financial assessment calculation.
- Act as the lead relating to all deferred payment matters. This will include responding to general and complex queries, preparing all paperwork including the contract between the council, the service user or representative and care provider where necessary. Meeting with applicants either virtually or in person when required. Working with the debt recovery team to ensure the legal charge is registered and everything is in place e.g. property insurance.
- Responsibility for first- and third-party top ups including ensuring the agreement is in place, contacting any of the parties to the top up should there be issues e.g. top up not paid, ensuring that the top up is conducted as per the Care Act and contacting the care provider should there be any issues.
- Lead on appeals in relation to financial assessments, deferred payments, disability related expenditure, top ups and any other adult social care finance related matters.
- Investigate complaints, members enquiries and complex customer queries and prepare responses for these to be signed off by managers.
- Contribute to improving the financial assessment process within the SSA contributing ideas to innovatively improve the service or change systems and processes to take account of new legislation.
- To actively lead or participate in change within the department to maximise resources.
- To ensure that policy and procedures are updated as and when required
- To be fully involved in the introduction and progression of adult social care reform within adult social care finance. Contributing to the development of information and systems.
- Providing training to care teams, new starters, voluntary sector and other stakeholders particularly in relation to adult social care reform, deferred payments, top ups and financial assessments.
- Meeting with service users or their representatives to discuss complex matters either virtually or in person as and when required.
- To be involved with consultation for changes in policy that may include attending meetings with the public or voluntary sector to present the changes and respond to questions presented.

Generic Duties and Responsibilities

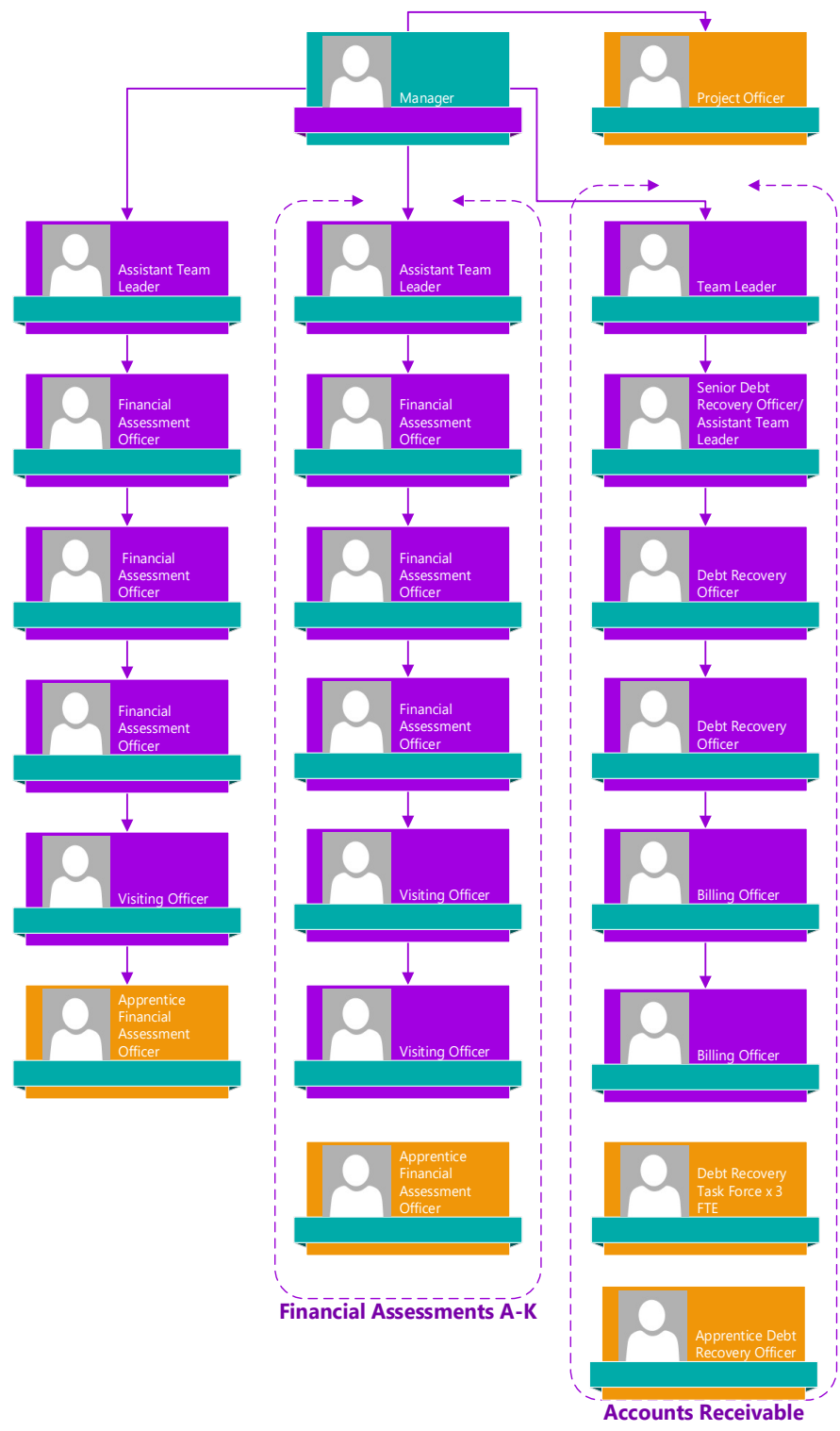
- To contribute to the continuous improvement of the services of Richmond & Wandsworth Better Service Partnerships.
- To comply with relevant Codes of Practice, including the Code of Conduct and policies concerning data protection, handling complaints and health and safety.
- To adhere to security controls and requirements as mandated by Richmond and Wandsworth procedures and local risk assessments to maintain confidentiality, integrity, availability and legal compliance of information and systems
- To promote equality, diversity, and inclusion, maintaining an awareness of the equality and diversity protocol/policy and working to create and maintain a safe, supportive and welcoming environment where all people are treated with dignity and their identity and culture are valued and respected.
- To understand both Councils' duties and responsibilities for safeguarding children, young people and adults as they apply to the roles within the Councils.
- The profile is not intended to be an exhaustive list of the duties the post holder will carry out. Other reasonable duties commensurate with the level of the post, including supporting emergency and priority situations, will form part of the role.

Additional Information

This post is regarded as customer facing and the post holder would be expected to work as part of a team to ensure that the council's core hours are covered.

The role is a linked grade and has detailed progression criteria attached to it. Progression through the linked grade band is dependent upon the individual demonstrating each of the listed criteria over a regular period as set out in the job description.

Current team structure



Person Specification

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Our Values

THINK BIGGER

EMBRACE DIFFERENCE

CONNECT BETTER

LEAD BY EXAMPLE

PUT PEOPLE FIRST

Our Values are embedded across Richmond & Wandsworth Better Service Partnership and throughout all roles and responsibilities at all levels of the organisation. Please [familiarise yourself with our values](#) as they are an integral part of our recruitment and selection process.

Person Specification Requirements			Assessed by A/I/T/C (see below for explanation)
Knowledge	Essential	Desirable	Assessed
Knowledge of the Care and Support Statutory Guidance in relation to charging for care		I	
Experience	Essential	Desirable	Assessed
Experience in a finance or adult social care environment		A	
Experience of maintaining accurate financial case records		A & I	
Experience of analysing financial information and applying a set of complex rules to reach sounds conclusions	A & I		
Skills	Essential	Desirable	Assessed
Good oral and written skills to provide clear and concise messages	A & I		

Basic knowledge of and ability to use standard IT packages (Microsoft Office including Outlook)	A		
Ability to apply good problem-solving skills to reach evidence-based conclusions	A & I		
Ability to organise and prioritise own workload within defined requirements for the role	A & I		
Ability to present complex financial issues to enable the recipient to understand	A & I		
Qualifications	Essential	Desirable	Assessed

A – Application form / CV

I – Interview

T – Test

C - C