

JOB DESCRIPTION



Post Title: Financial Assessment and Welfare Benefits Visiting Officer	
Department: Adult Social Care	Establishment/Post Number:
Division/Section: Adult Social Care – Financial Support Services Financial Assessment and Welfare Benefits Team	Post Grade: Grade 9 proposed
Location: Various – includes remote, lone, office and agile working.	Post Hours: 37 hours per week.
Special Conditions of Service: <ul style="list-style-type: none">• Car Allowance payable - subject to annual review• Subject to Enhanced DBS Clearance• Flexitime Scheme in operation• Willing to work in an agile, office based or remote manner as required, including working off-site at customer property and neutral locations.	

Purpose and Objectives of Post:

- To provide a welfare benefits income maximisation service for adults receiving social care services people in accordance with Department of Works and Pensions guidance and regulations.
- The Welfare Benefits Visiting Officer will play a key role in supporting adults with care and support needs by ensuring they are receiving their full welfare benefit entitlement. The postholder will proactively identify unclaimed or underclaimed benefits, working directly with customers, often in their homes, to help them understand, access, and apply for financial support.
- To gather required evidence, assist with form completion, and submit applications on behalf of the customer or signpost to appropriate agencies when necessary.
- To monitor and track the progress of benefit claims, recording outcomes to demonstrate service impact, including income generated for customers and potential changes to client contribution charges. This ensures accurate and timely financial assessments and contributes to the overall effectiveness of Adults Social Care Financial Support Services.
- To support the Financial Assessment and Welfare Benefits Officers in undertaking timely and accurate financial assessments. To conduct home visits with service users to collate personal financial information, and to complete a disability related expenditure assessment, in order to financially assess charges to service users for a package of services.
- To support a Financial Assessment service for adults receiving social care services, to assess their contribution towards the cost of their care needs packages and arrange for client contribution charges to be made, ensuring these comply with Care and Support (Charging and Assessment of Resources) Regulations
- To support assessments and charges are carried out appropriately to contribute to the Adult Care Client Money Service income collection budget.
- To provide advice and support to people receiving care services, their representatives, colleagues and other associated parties regarding the financial assessment and client contribution charging policies and processes.
- To ensure services are person centred by offering contact in a variety of ways, home visits, face to face contact, telephone contact or email contact as appropriate.
- To assist with Council debt prevention by ensuring people understand their assessments and charges, claim the correct welfare benefits and make referrals for money management and safeguarding services where people are struggling to deal with their own finances or financial abuse is suspected.
- To support the operation of the Council's Deferred Payment Loan Scheme in accordance with Care Act 2014 - Care and Support (Charging and Assessment of Resources) Regulations

Accountable to: Service Manager – Financial Support Service

Immediately Responsible to: Team Leaders – Financial Assessments and Welfare Benefits Service

Immediately Responsible for: Not applicable

Relationships: (Internal and External)

- People receiving care services, their personal representatives, carers, solicitors and advocates.
- Departmental Staff and colleagues across the Council
- All other relevant agencies and organisations such as the Department for Works and Pensions, NHS, service providers and voluntary organisations

Control of Resources

- Personal computer, and associated equipment.
- Data held on software packages and associated recording systems appropriate to the duties of the post.
- Financial and Personal records relating to the customers of the Financial Assessment Service.
- Other resources delegated to the postholder.
- Health and Safety Awareness of self and others.

Duties/Responsibilities:

Knowledge & Skills

- Acquire, maintain, interpret and apply up to date specialist knowledge of Department of Works and Pensions benefits and pensions entitlement regulations and claims processes.
- Acquire, maintain, interpret and apply specialist knowledge of the Care & Support Statutory Guidance and Care and Support (Charging and Assessment of Resources) Regulations alongside Council specific policies and procedures.
- Carry out a welfare benefits checks, working directly with customers, to help them understand, access, and apply for financial support.
- Provide advice and support to people receiving care services, their representatives and colleagues, on all aspects of the Financial Assessment and Benefits Service
- Ensure the level of knowledge acquired enables both the interpretation of financial information submitted and allows for any subsequent challenge regarding potential fraud attempts to reduce care charges.
- Be able to interrogate financial information provided to identify any potential omissions and inconsistencies that may affect the financial assessment or may suggest financial abuse.
- Be able to explain complex financial information to people receiving care services and their representatives, ensuring they understand the financial implications of paying for their care and support packages. Adapting the delivery of information to suit individual needs.
- Be able to undertake difficult conversations with people receiving care services and their representatives including, delivering unwelcome financial assessment results, discussions around potential fraud or asset deprivation, conversations with bereaved relatives around outstanding deferred payment loans and charges. All to be undertaken respectfully and sensitively whilst remaining objective and professional.

- Be able to undertake personal conversations with people receiving care services around their medical and care needs to support with claiming disability benefits and undertake disability related expenses assessments.
- Ensure all home visits are conducted in accordance with Council lone working principles and policies, considering peoples communication needs and own personal safety issues.
- Ensure knowledge and understanding of relevant IT software systems to efficiently carry out duties. Be able to navigate, enter data, and interrogate data reports to provide information, trouble shoot and answer queries.
- Ensure knowledge and understanding of General Data Protection Regulation (GDPR), Council and departmental policy requirements, to protect highly confidential financial and personal data collected from people receiving care services and ensure clear, accurate records are maintained confidentially and securely.

Service Delivery

- Conduct home visits and outreach appointments to assess customer circumstances and identify unclaimed benefits.
- Provide tailored advice, assistance, and advocacy to support customers in progressing benefit applications, including completing forms, gathering evidence, and liaising with external agencies where required.
- Maintain a clear audit trail of all benefit interventions, including projected and actual income outcomes.
- Track claim progress and maintain regular contact with customers and relevant agencies (such as DWP and HMRC), updating case records accordingly.
- Work collaboratively with Financial Assessment Officers to provide timely information that supports the completion of accurate and fair financial assessments.
- On receipt of a referral for a new or revised financial assessment, ensure named link with social worker established, where required, for permanent care home admission or transition from Childrens cases. Obtain all financial and personal details required to carry out the financial and disability related expenses assessments and carry out welfare benefit check. Calculate the client contribution charge towards the cost of assessed care services.
- Notify the person or their representative of the results of the assessment calculation, the weekly charge and the result of the welfare benefits check. Provide support to claim welfare benefits where needed.
- Ensure that contact is made with the person or their representative in the appropriate way for them ranging from postal, telephone and email communication or home visit to suit their needs.
- Carry out an 8-week review to ensure all benefits are in place and the person understands and is paying their assessed contribution.
- Respond to internal and external enquiries regarding financial assessment and charging implications ensuring an informed and accurate response adhering to the Council's principles on Customer Care.

- To create the residential care and shared lives payments file four weekly to interface with the Corporate financial systems. Liaise with residential care providers and departmental colleagues to resolve payment enquiries.
- To create the charging run files four weekly to interface with the Corporate financial systems. Liaise with corporate and departmental colleagues to resolve charging enquiries.

Decision Making & Initiative

- Using gained experience, knowledge and own judgement, interrogate and challenge information provided when carrying out the welfare benefit checks/applications and financial assessments.
- Using gained experience, knowledge and own judgement assess Disability Related Expenditure claims using medical evidence, social worker care needs assessment and analysis of expenditure with regard to Care Act legislation and Council DRE policies.
- Using gained experience, knowledge and own judgement make decisions during the financial assessment process to apply discretionary areas of the Care Act Charging Guidance and Council financial assessment and charging policies. Appropriately consider when decisions should be escalated for direction and support from Managers.
- Using gained experience, knowledge and judgement evaluate and deliver resolutions of queries and enquiries. Dealing with issues independently and objectively in a constructive manner with challenge where appropriate. Consider when issues and concerns should be escalated for direction, and support from Managers.
- Identify and advise relevant colleagues, of any issues and concerns identified during the financial assessment process, including any potential safe-guarding or financial abuse issues.
- Engage with people via phone or in person often in isolation due to agile and remote working practices.

Personal Development

- Ensure up to date knowledge of all relevant legislation, guidance, policy and procedure used within the service.
- To participate in mentoring and supervision sessions, team meetings and employee reviews including taking responsibility for your personal development and contributing to the identification of your training and development needs
- Assist with the ongoing improvement of service delivery. Actively challenge to contribute to the development, implementation, monitoring and reviewing of procedures.
- Operate as a responsible team member, jointly managing workloads, attending, and contributing to team meetings and supporting colleagues to achieve team targets.
- Undertake any relevant training required from both Central Government and the Council
- Provide support, guidance, on-the-job training, and mentoring to colleagues within the team.

General

- As an employee of Bury Council you have a responsibility for, and must be committed to, safeguarding, and promoting the welfare of children, young people and vulnerable adults and for ensuring that they are protected from harm.
- Bury Council is committed to equality, diversity, and inclusion, and expects all staff to comply with its equality related policies/procedures, and to treat others with fairness and respect.
- The post holder is responsible for Employees Duties as specified with the Corporate and Departmental Health and Safety Policies.
- As an employee of Bury Council you should contribute to a culture that values and supports the physical and emotional wellbeing of your colleagues

Where an employee is asked to undertake duties other than those specified directly in his/her job description, such duties shall be discussed with the employee concerned who may have his/her Trade Union Representative present if so desired. (See paragraph 203 of supplemental Conditions of Service)

Job Description Prepared by:	Sign:	Date:
Agreed correct by Postholder:	Sign:	Date:
Agreed correct by Supervisor/Manager:	Sign:	Date:

PERSON SPECIFICATION

Adult Social Care

SHORT LISTING CRITERIA	ESSENTIAL	DESIRABLE
Organisational and procedural knowledge of Council policies and government legislation in respect of Charging, Financial assessments and Welfare benefit entitlements		✓
Practical experience in a financial service area with knowledge of financial and administrative policies and procedures and financial assessment and welfare benefit entitlement principles		✓
Experience of learning and maintaining up to date knowledge of complex financial regulations and guidance and using analytical skills to apply that knowledge to practical day to day situations		✓
Knowledge of Adult Social Care policy and practice		✓
Working knowledge of the Care Act 2014 Care and Support Statutory Guidance and DWP benefit entitlement requirements.		✓
Experience of working directly with vulnerable individuals in a community, social care, or financial support setting.		✓
Ability to conduct home visits and engage customers in a respectful, patient, and supportive manner.	✓	
Literacy and numeracy skills with an elevated level of accuracy, analysing and processing sensitive data in accordance with Council policies and Government Data Protection legislation	✓	
Experience of inputting and extracting sensitive data from IT systems, a competent Excel user with a high degree of systems literacy.	✓	
Excellent and effective communication and negotiation skills. Experience of dealing with the public in a service environment – face to face, over the telephone and written with an ability to deal with all cases with tact, sensitivity, professionalism and a regard for dignity and confidentiality.	✓	
Effective at building positive and productive working relationships with internal and external colleagues, customers, carers, and service providers.	✓	

Ability to manage tasks under pressure and rapidly changing deadlines, self-motivated with a proactive approach and capable of working on own initiative, and a team player demonstrating maximum flexibility, be disciplined and deadline conscious	✓	
Have a current driving licence & access to a vehicle.	✓	

CRITERIA FOR INTERVIEW AND OTHER ASSESSMENT METHODS

The short-listing criteria listed, per the above person specification, plus the following:

ASSESSMENT METHOD	CRITERIA
Interview	Ability to deal sensitively and accurately with customer enquiries and concerns.
Interview	Ability to work under pressure / regular emotional demands of the job
Interview	Computer literate and competent in the use of IT systems with particular reference to Microsoft Word and Excel.
Interview	Ability to complete accurate financial calculations and records, statistics and ensure appropriate filing and financial records are maintained
Interview	Excellent written and verbal communication skills
Interview	Willingness and ability to take on new challenges in response to change
Interview	Ability to organise and prioritise workloads effectively and work on own initiative to meet targets and deadlines
Interview	Ability to fully contribute and work within a team setting to collectively provide an efficient and effective service