

Job Description and Person Specification Profile

Job Title	Assessment Officer – Adults Client Finance
Job ID	T10
Service	Financial Management
Grade	E
Reporting to	Team Manager – Adults Client Finance

The Role

This role will contribute to the provision of an efficient, effective and comprehensive financial advisory and support service to service users and their families or representatives who receive an Adult service care package.

The role requires completion of financial assessments for service user contributions towards care packages together with related invoicing and recovery of assessed charges.

In addition the role requires supporting vulnerable residents with the daily management of their personal finances in the role as an Appointee or Deputy for the resident.

Main Duties and Responsibilities include:

- You will be responsible for collating financial information and undertaking financial assessments to determine a service user's contribution towards the cost of their care package in accordance with relevant legislation, national guidance and local policies, procedure's and guidance.
- You will advise service users or their families / representatives of the processes and procedures regarding the charging for care..
- To respond to correspondence, in person and telephone enquiries in an efficient, polite and professional manner.
- To prepare documentation for care package charges managed via the Deferred Payment Scheme.
- To develop and maintain excellent working relationships with service users and their families or representatives.
- To facilitate the collection of assessed care charges and debt recovery processes.
- To review Adult services outstanding debts and client case files, use relevant and available information to determine appropriate action, whilst ensuring team procedures and timescales are met and accurate records of actions are maintained.

- To sensitively manage interaction with distressed service users and their families or representatives relating to the collection of Adult services debts due to the Council.
- To make applications to the Court of Protection and the Department for Work and Pensions for the Council to be appointed to act on behalf of the service user.
- To maximise the service user's income by claiming all benefits, discounts, exemptions and other income to which the service user is entitled.
- To ensure the service user receives monies for daily living expenses and that personal accounts are paid on time
- To manage, monitor and reconcile the service user's bank account using an online banking system
- To support the preparation of the annual Deputy report for the Office of the Public Guardian
- To comply with all Council policies, procedures, professional practices and relevant regulations and legislation
- To liaise with colleagues within the Council, partners and external bodies to ensure accounts are correctly maintained.
- To visit service users in their home as required
- To work as part of a team with an ability to work independently within agreed guidelines.
- To contribute to opportunities to develop the use of corporate and service specific systems to support improved and efficient ways of working which add value to service delivery
- To contribute to the business planning and risk management strategies of the Financial Management Service
- To contribute to the performance management, quality assurance and continual improvement of the financial management service delivered to service users
- To deputise for the Team Manager as appropriate
- To supervise and mentor staff members of the team to ensure continuous service improvement
- To manage work priorities and deadlines

- To undertake continual professional development
- To respond to enquiries and requests for information and advice from both internal and external customers in a professional and efficient manner
- To work flexibly when required at any administrative site within the borough including an element of unsocial hours.
- The post holder will be subject to rotation for posts on the same pay band as required.
- The post holder will be required to attend meetings, seminars, training courses within or outside the Borough as required.

The duties may vary from time to time without changing the nature of the post or the level of responsibility, and the post holder may also be required to carry out any other duties appropriate to the grading of the post.

About You

Your essential qualifications

- A minimum of 4 GCSE's (or equivalent) including English Language and Mathematics

Your essential skills, knowledge, and experience

- Supporting service users and their families or representatives in an appropriate, professional and equitable manner
- Experience of working successfully and effectively as part of a team delivering service improvements.
- Ability to provide advice and guidance to related parties.
- Analytical skills to review data that supports decision making with a focus on practical solutions and service improvement
- The ability to make and maintain positive working relationships with team members, service users and their families or representatives
- A commitment to professional high standards
- Values diversity, operates with integrity and openness, promotes equality of opportunity and good working relationships in employment and service delivery
- Self motivated
- Ability to plan, prioritise and organise workloads in response to competing demands.
- Ability to work without direct supervision.
- Ability to fulfil all spoken aspects of the role with confidence through the medium of English

If you have the following experience or qualifications – then that's great!

- Experience of undertaking financial assessments or similar services.
- Knowledge of relevant legislation
- Experience of management information systems

Our employees' skills, experience and knowledge are essential to our success along with their happiness, commitment, enthusiasm, and motivation to be the best they can be.

What can you expect from us?

- A fair salary and benefits
- Opportunities for good health and wellbeing
- Help you to grow, develop and to do your best.
- Enable you to be creative and innovative.
- Fully involve you in changes that affect you and your work.
- Listen, and act on your ideas and feedback.

Working together, we are proud to work for Tameside

Our **STRIVE** values underpin our practice and behaviours and are at the heart of everything that we do:

