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Role Profile

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| Job Title: | Financial Assessment Officer |
| Location: | Colindale / Hybrid |
| Directorate: | Adults and Health – customer finance |
| Grade: | F |
| Salary Range: | £34,488 - £36,585 |
| Reports to: | Team Leader – Financial Assessment Officer |

1. Purpose of Job:

Work within a team to provide a comprehensive assessment and income service for the council. Calculate clients financial contributions (financial assessments) towards their residential/community care services. Raise invoices for client contribution, make necessary adjustments to their account and produce adequate statements of account on request. Have a sound knowledge of the Council's Fairer Contributions policy and Charging for Residential Accommodation Guidelines (CRAG). Provide a service advising clients through all forms of communication with regard their relevant accounts with the council. Seek to maximise client income by providing appropriate benefits advice and referring their cases to DWP. Liaise and provide advice with clients/representatives, colleagues within other services and agencies to resolve queries relating to financial assessment.

2. Key accountabilities:

- Ensure all relevant data held on electronic systems are maintained accurately and updated expeditiously.
- Raise and dispatch invoices within agreed timescales to include raising credit notes, account statements. Ability to originate contracts, Top Up agreements, and to calculate complex depletion statements.
- To be able to liaise with families, support workers and other professionals in relation to the financial assessment of the client.
- To provide comprehensive support to the Income Team to enable them to collect debts effectively.
- To provide detailed information to Care Management in various electronic or other formats in relation to funding queries.

- To be able to deal with vulnerable and distressed clients sympathetically and calmly and effectively carry out the financial assessment.
- To be able to access and understand care plans to ensure that the relevant information is accurately reflected in the financial assessment of the client.
- Maintain regular communication with the Visiting Team (Customer Finance), identifying specific cases for referral.
- Respond to all correspondence within reasonable timeframes as may be established from time to time.
- Resolve client enquiries received.
- Provide accurate financial assessments of client contributions and ensure clients are advised within the timescales set. Where required to visit clients at home in order to enable accurate and expedient financial assessments. To carry out financial assessments with clients who chose to visit the office.
- As required, to provide financial assessment data to team leader/manager.
- Provide support in general to line managers and generally contributing to the development of the service.
- Assist in the induction and training of new members of staff.
- Team Leadership and Management
 - Assist in the induction and training of new members of staff.

3. Financial Responsibilities:

4. Health and Safety Responsibilities:

Take responsibility for Health & Safety in the workplace, identifying, acting upon and where appropriate escalating any risks

5. Promotion of Corporate Values

To ensure that customer care is maintained to the agreed standards according to the council's values. To ensure that a high level of confidentiality is maintained in all aspects of work. Our values:

Caring / Learning to Improve / Inclusive / Collaboration

6. Flexibility

In order to deliver the service effectively, a degree of flexibility is needed and the post-holder may be required to perform work not specifically referred to above. Such duties, however, will fall within the scope of the post, at the appropriate grade.

7. The Council's Commitment to Equality

To deliver the council's commitment to equality of opportunity in the provision of services. All staff are expected to promote equality in the workplace and in the services the council delivers.

PERSON SPECIFICATION

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| Grade: | F |
| Salary Range: | |
| Reports to: | Team Leader – Financial Assessment Officer |

| Criteria | Essential/Desirable | Assessed by: |
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| Qualification required | | |
| Professional qualifications/memberships - Educated to GCSE standard or equivalent level of experience | Essential/Desirable | Application/Interview |
| Education - Good numeracy and literacy skills | Essential/Desirable | Application/Interview |
| Technical / knowledge requirements | | |
| IT Skills - Good IT and data management skills, including proficiency in Microsoft Word, Outlook and Excel spreadsheet packages: - Knowledge of financial systems and databases: essential Knowledge of key systems: SWIFT/SAP/integra. | Essential Desirable | Application/Interview |
| CRAG/Fairer Charging - Working knowledge of CRAG and Fairer Charging. | Desirable | Application/Interview |

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| <ul style="list-style-type: none"> - Ability to understand and interpret complex guidelines and legislation. - To understand these guidelines and regulations. | <p>Essential</p> <p>Desirable</p> | |
| Behavioural Competencies | | |
| Personal Effectiveness | | |
| Communicating & Influencing <ul style="list-style-type: none"> - Is courteous and polite when interacting with customers and colleagues. - Passes on information accurately and promptly. - Listens carefully to others and asks questions for clarification - Presents ideas and views with confidence and clarity. - Writes fluently and succinctly using appropriate style. - Adopts a clear and professional telephone manner. - Deals with confidential or sensitive issues discreetly. - Presents a positive and professional image of self and LB Barnet when communicating. - Is open and honest when communicating with others | <p>Essential/Desirable</p> | <p>Application/Interview</p> |
| Respecting others <ul style="list-style-type: none"> - Respects the opinions of others and acknowledges opposing viewpoints. - Consistently acts in a way that promotes equality and diversity Shows integrity and fairness when dealing with customers and colleagues. - Acts on and achieves the promises and commitments made to customers and colleagues. | <p>Essential/Desirable</p> | <p>Application/Interview</p> |

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| <ul style="list-style-type: none"> - Respects others' time by being punctual. - Demonstrates impartiality and objectivity when taking actions and making decisions. - Shows empathy and understanding for the feelings of, and situations faced by others. - Is aware of own responsibilities for the health, safety and welfare of self and others | | |
| Striving for Excellence <ul style="list-style-type: none"> - Demonstrates a positive attitude and approach to work. - Is self-motivated, undertaking relevant tasks and activities without always having to be asked. - Copes effectively with work-related pressures and setbacks - Is flexible and adaptable to changing goals and circumstances - Acts quickly to deal with potential problems. - Ensures own work is of a high quality, accurate and timely. - Strives to improve on past standards of performance. - Manages time and prioritises work to maximise productivity and effectiveness. - Displays conscientiousness in getting the job done to the best of ability. | Essential/Desirable | Application/Interview |
| Leadership | | |
| Setting Direction <ul style="list-style-type: none"> - Is clear about LB Barnet's strategic priorities and the goals of own service area/Directorate. - Understands how own work contributes to the LB Barnet's \ goals. - Prioritises and plans own work based on an understanding of the 'bigger picture'. | Essential/Desirable | Application/Interview |

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| <ul style="list-style-type: none"> - Provides feedback on, and constructively challenges, the direction and working practices of the team, service area, or organisation. - Seeks to understand the need for, and responds proactively to organisational change. - Approaches change positively. | | |
| Managing performance <ul style="list-style-type: none"> - Works with manager to agree performance objectives. - Takes ownership for, and commits to achieving performance objectives. - Monitors and evaluates own performance against objectives. - Positively inputs to the performance appraisal and development review process. | Essential/Desirable | Application/Interview |
| Developing talent <ul style="list-style-type: none"> - Demonstrates a commitment to own personal development and learning. - Volunteers to take on new challenges and learn new skills. - Actively seeks and acts on feedback on own performance. - Helps to develop stretching but achievable objectives. - Provides praise and constructive feedback to others. - Gives help and coachina to less experienced colleagues. - Learns from the skills and experience of others. | Essential/Desirable | Application/Interview |
| Working in partnership | | |
| Team working <ul style="list-style-type: none"> - Shares information with colleagues to deliver objectives. | | |

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| <ul style="list-style-type: none"> - Contributes to a positive team spirit and healthy working environment. - Actively contributes ideas in team meetings or discussions. - Appreciates the demands on team colleagues and willingly provides them with support. - Can agree to compromise where appropriate | Essential/Desirable | Application/Interview |
| Cross-Barnet working <ul style="list-style-type: none"> - Understands the key functions of LB Barnet and the broad roles of service areas. - Recognises the advantages of working with others across the council. - Builds strong working relationships, and seeks out views of people outside of their team. Appreciates the political make-up and decision making processes of the council. - Shares information and knowledge with those outside of own team. | Essential/Desirable | Application/Interview |
| External Partnership Working <ul style="list-style-type: none"> - Readily and effectively works with representatives of partner organisations. - Has a broad understanding of the wider local government context. - Recognises the importance to the council of active partnership. | Essential/Desirable | Application/Interview |
| Values & Behaviours | | |
| Caring | | |
| Integrity- I work with candidates and colleagues in a way that builds trust. | Essential/Desirable | Application/Interview |
| Empathy- I say "thank you" and "well done" where appropriate, and take time to 'check in' to see if the people I work with are ok | Essential/Desirable | Application/Interview |
| Support- I support my colleagues to deliver excellent services. I focus on resolving any issues and capturing lessons learnt | Essential/Desirable | Application/Interview |

| Learning to Improve | | |
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| Insight- I regularly rely on evidence and professional standards to support my work and decision making. | Essential/Desirable | Application/Interview |
| Agile-I am fully empowered to act within the scope of my role | Essential/Desirable | Application/Interview |
| Growth Mindset- I take responsibility for my own personal development, growth and learning and support others with their learning and development where I can | Essential/Desirable | Application/Interview |
| Inclusive | | |
| Personal Responsibility- I am curious about what is important to others around diversity. I reflect and act upon this curiosity to improve my own understanding | Essential/Desirable | Application/Interview |
| Engage with discomfort- I am open to and reflect on what makes me uncomfortable and use my engagement with others to challenge myself and constructively challenge others | Essential/Desirable | Application/Interview |
| Champion Diversity- I recognise the advantages and importance of equality, diversity and inclusion in delivering outcomes for residents, and take an active role to ensure they are implemented and integrated in everything I do. | Essential/Desirable | Application/Interview |
| Collaborative | | |
| One Team- I actively and purposefully build my network of relationships with people across the Council and with partners. I proactively seek feedback and evidence as a way of learning from and improving the way I work with others | Essential/Desirable | Application/Interview |
| Accountable- I accept responsibility for my own actions and decisions, and demonstrate commitment to ensuring these align to what is best for Barnet | Essential/Desirable | Application/Interview |
| Outcomes Focused- I adapt my way of working to best suit the outcome we are trying to achieve within the scope of my role and professional standards | Essential/Desirable | Application/Interview |