WOKINGHAM BOROUGH COUNCIL	**Job Description**			Job Reference
				712927
Job Title	Financial Assessments Assistant			
Service	ASC Prevention and Short-Term Services	Team	Financial Assessments & Payments Team	
Location	Shute End/Smart Working			
Reports to	Senior Financial Assessments & Payments Officer			
Responsible for	N/A			
Grade	Type of position:			Date
Grade 4	Fix term Contract - 6 months – part time – 22 hours			May 2024

This job description has been designed to indicate the general nature and level of work required of the post to indicate the level of responsibility. It is not a comprehensive or exhaustive list and the line manager may vary duties from time to time which do not change the general character of the job or the level of responsibility entailed.

Service Purpose

Conduct financial assessments in respect of social care services customers to decide if a financial contribution is required, whilst maximising income for the Council and the Customer.
To undertake the Council's Direct Payment offering, ensuring agreements are signed, customers paid in the most appropriate way and funds are correctly spent and monitored.
Raising of Purchase Orders, paying provider invoices and invoicing of charges.

Purpose of the role

To provide customer and officer support in respect of social care services customers to decide if a financial contribution is required, whilst maximising income for the Council and the Customer, carried out in line with the Council's policy and the Care Act 2014, whilst considering the MCA 2005.

Main Accountabilities

1	Monitor on a daily basis, team inboxes, post received, send reminders and chase responses to any outstanding work.
2	Supporting customers with completing Financial Assessment forms, arrange visits as needed and assist customers to access our on-line portal (BetterCare Finance).
3	To obtain, record, review, verify and collate financial information/evidence to be used in a financial assessment, in line with defined legislation.

Private: Information that contains a small amount of sensitive data which is essential to communicate with an individual but doesn't require to be sent via secure methods.

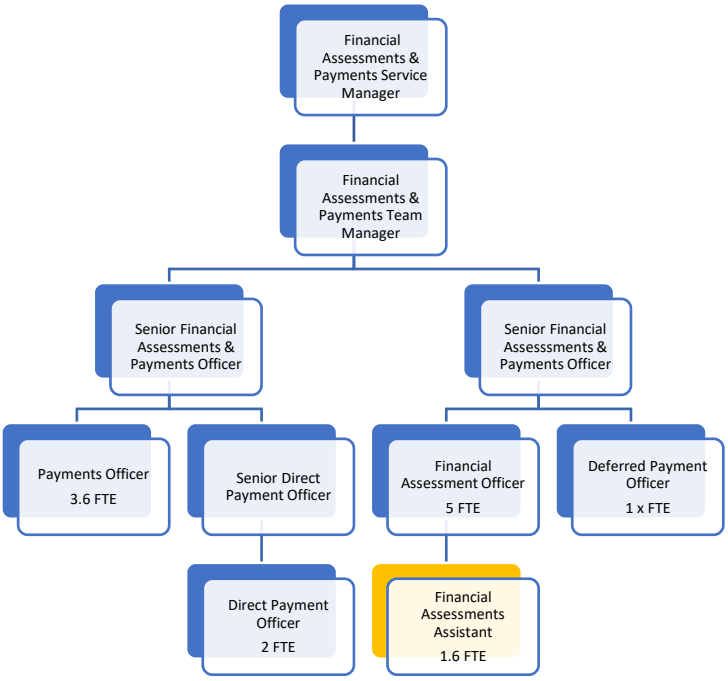
4	Give general advice and guidance to customers and their representatives, via phone, email or in person callers, in respect of financial assessments and at times other welfare & council benefits utilising software packages available.
5	Maintain sufficient records so that all appropriate monitoring and statistical records covering the function can be compiled on a monthly, quarterly, and annual basis.
6	Ensure that any Adult Protection Safeguarding issues are escalated through appropriate channels.
7	First contact for financial assessments and annual reviews under the Council's Charging Policies and other legal frameworks, through desk-based work, in accordance with defined legislation, procedures and timescales so that financial assessments may be carried out and charged correctly for services.
8	To provide general explanations and support to colleagues and clients about charging policies and payment policies. Respond to general enquiries in writing, face to face and by telephone, providing accurate information in easy-to-understand language.
9	To liaise with budget holders/care managers regarding without prejudice cases and doing OPG100 to confirm when Court of Protection awarded to protect WBC funding and reduce debt to the council.
10	Give general advice on DPA's to customers and colleagues.
11	Keep updated with current legislation and government changes, specifically in connection with the Care Act 2014 and the Mental Capacity Act 2005.
12	To support the continuous improvement of processes and procedures within the service using best practice from others where appropriate.
13	To prove willingness to proactively identify service improvements, making recommendations to improve overall service delivery and customer service or working practices with knowledge of legislative requirements, quality assurance objectives and good practice. This may include contributing to development of IT systems to support improvements.

Supervision Received	Performance, general guidance, objective setting and feedback
Supervision Given	N/A
Contacts & Working Relationships	*Internal – Adult Social Care Teams, Finance Teams, Direct Payments Team, WBC Legal services, Safeguarding Team, Accounts Receivable, Purchase to Pay.* *External – Service users, third parties, Department for Works & Pensions, care providers, Court of Protection (OPG,) National Association of Finance Assessment Officers, Solicitors, Land Registry, Valuation Office Agency.*
Management of resources or budget	N/A

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Special Factors	*DBS check required*

Organisation Chart



Person Specification

Qualifications	**Essential**	**Desirable**
	Relevant work experience. Good standard of education, including excellent literacy and numeracy skills	
Technical Skills.	**Essential**	**Desirable**
	Good IT skills including office software such as Microsoft Word, Outlook, PowerPoint and Excel Good written and verbal communication skills	

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	Ability to actively listen in order to extract and assess the important information	
Knowledge	**Essential**	**Desirable**
	Experience of working to tight timescale and with high levels of accuracy Experience within a customer-focused service providing excellent customer service	Basic working knowledge of the Care Act 2014 Understanding of the Mental Capacity Act 2005 Relevant Council policies
Experience	**Essential**	**Desirable**
	Previous experience of working in an office environment Experience of working with vulnerable customers	
Other	**Essential**	**Desirable**
	DBS check required	
Completed by:	Nicky Thomas	**Date:** August 2023

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