| Role Structure | Role Details |
| --- | --- |
| Directorate: | Community Wellbeing |
| Grade: | HC6 |
| Location: | Hereford |
| Responsible to: | Financial Assessment Team Leader |

# Job Description

# Job Role: Financial Assessment Visiting Officer

**Service: Welfare and Financial Assessment Team**

## Main purpose of the role

As a Financial Assessment Officer under the Care Act, the primary responsibility is to conduct thorough financial assessments of individuals requiring social care support for both residential and non-residential services.

The role plays a critical part in determining the financial contributions individuals need to make towards their care services. This position requires a high level of attention to detail, empathy, and strong analytical skills to ensure fair and accurate assessments in line with legislative guidelines.

The Financial Assessment Officers perform detailed financial assessments of individuals' income, savings, assets, and liabilities to determine their eligibility for financial support for Residential Care, Domiciliary Care and Community support under the Care Act and Herefordshire Council’s Care and Support Charging Policy. They also aim to maximise the take-up of benefit entitlements, and provide access to sources of independent financial information and advice for individuals being financially assessed or with on-going care and support needs.

| Key Duties and Responsibilities | Frequency of Task |
| --- | --- |
| * To obtain and verify financial information from clients and/or their representatives and carry out financial assessment of clients receiving chargeable care services, identifying any gaps in information, and making additional enquiries as necessary to ensure maximum accuracy of the assessment. * Validate income, expenditure, and capital (including property ownership) information provided by clients during the financial assessment, by checking bank statements, receipts, bonds, trust, Land Registry, DWP (Department for Work and Pensions) and Revenues and Benefit records. * Inform individuals, their carers/representatives and social care professionals of all relevant issues relating to charging and financial assessments, including providing individuals with access to sources of independent financial information and advice based on the level of support required. * Carry out financial assessments in an individual's own home. Have due regard to the individual client circumstances including the   assessment of disability and housing related expenditure.   * Identify any unclaimed entitlement to state benefits that individuals may be entitled to and assist the individual to claim those benefits. * To inform clients of their assessed contributions, the invoicing schedule procedure and payment methods available to them. * Where appropriate assist individuals with submitting an appeal against assessed charges. * Accurately record and maintain client records and other relevant data on computerised systems, in accordance with data protection policies and procedures. * Compile and document evidence and upload into appropriate databases as needed for clients during the financial assessment process. * Effectively manage hybrid work arrangements, balancing remote and in-office collaboration. | * Daily * Daily * Daily * Daily * Daily * Daily * Daily * Daily * Daily * Daily |
| * Undertake timely reviews of financial assessments in accordance with current policy and departmental guidelines. * To deal with all incoming queries relating to financial assessments. * To acquire and maintain up to date knowledge of appropriate charging regulations and procedures as detailed in the Care Act 2014 and Herefordshire Council Policies. * Undertake training, e-learning, and research to maintain professional development in the role. * Maintain up to date knowledge on all state benefits by attending training sessions, completing e-learning modules, and reading DWP circulars and other welfare benefit information that is published and made available. * Identify other services and support people can access through Talk Community, Herefordshire’s Directory for care, support activities and services. * Attend forums, events, information, and advice surgeries to promote the team and the services available, and to keep up to date with knowledge of other services available. * Support the Council’s debt recovery process by liaising with or revisiting clients who may fall into arrears, instigating a financial re-assessment. * Manage personal workload on a day-to-day basis, including compliance with lone working and health and safety policy and procedures, and performance standards. * Liaise with Adult Social Care teams, other teams within Herefordshire Council and local or partner organisations. * Undertake the Council’s statutory duties in relation to safeguarding vulnerable adults and their finances. | * As required * As required * As required * As required * As required * As required * As required * As required * As required * As required * As required |

**Person Specification**

| **Requirements** | **Essential or Desirable** | **Identified by**  **A – Application I – Interview** |
| --- | --- | --- |
| **Qualifications and Training** | | |
| * Maths and English at GCSE grade C or above or equivalent. * Proficient in the use of computerised systems, including data entry on a personal computer and use of Microsoft 365 applications, including Word, Excel, and Outlook. | Essential  Essential | A, I  A, I |
| **Experience & Knowledge** | | |
| * Previous experience of working as a Financial Assessment Officer. * Knowledge of Care Act 2014. * Knowledge of Department of Health Statutory Guidance on charging and financial assessments. * Knowledge of Herefordshire Councils Care and Support Charging Policy. * Knowledge of the range of welfare benefits, their administrative and adjudication processes. * Awareness of the functions of Adults & Communities directorate and the role of prevention services. * Experience of working within an administrative discipline and managing multiple processes at any one time. * Experience of visiting people in their own homes and gathering relevant information and querying evidence to ensure accurate charges are applied. | Desirable  Desirable  Desirable  Desirable  Desirable  Desirable  Desirable  Desirable | A, I  A, I  A, I  A, I  A, I  A, I  A, I  A, I |
| * Experience of working in a customer focused environment, and working with a range of professionals, including internal and external partners who support vulnerable individuals. | Essential | A, I |
| **Skills and Abilities** | | |
| * Communicating complex and difficult messages effectively and in a sensitive manner, face to face, over the telephone, or in writing. * Fluency level B2: Can adjust to the changes of direction, style and emphasis normally found in conversation. Can produce stretches of language with fairly even tempo: although he/she can be hesitant as he or she searches for patterns and expression, there are few noticeably long pauses. * Ability to carry out financial calculations in a person’s home with the use of a laptop and calculator. * Must be able to form good working relationships with colleagues. * Planning and organising own workload. * Ability to use own initiative to determine when discretion can be applied. * Must be able to work without direct supervision. * Ability to research information using reference material and relevant websites. * Capable of effectively balancing remote home working with office and in-person meetings. * Ability to travel across Herefordshire to visit service users, ensuring timely visits and efficient service delivery. * A commitment to your own professional and personal development. * Flexible and positive attitude relating to work, including ability to work flexible hours in exceptional circumstances. | Essential  Essential  Essential  Essential  Essential  Essential  Essential  Essential  Essential  Essential  Essential  Essential | A, I  A, I  A, I  A, I  A, I  A, I  A, I  A, I  A, I  A, I  A, I  A, I |

All council staff have a duty to promote the welfare of children, young people, and adults with care and support needs at risk of abuse and neglect who cannot take steps to protect themselves. Ensuring you attend mandated safeguarding children and safeguarding adults training to enable you to recognise the concerning behavior, know how to talk about it, and consent/duty to share information effectively. You will also learn about the legalities and procedures the social care staff can take.

Our values are what we represent as a council and our behaviours are how we act to get things done to reach our potential.

## Our Values and Behaviours

This image displays the council's values: 

People, Excellence, Openness, Partnership, Listening and Environment

As well as the Behaviours:

Focus on outcomes, Fixing Things, Valuing Difference, Personal Responsibility, Busting Boundaries, Personal Responsibility, People Focus, Performance Balance and being Transparent and Accountable. 