

JOB DESCRIPTION

Job Title	Financial Assessment Officer
Directorate	Resources
Service	Financial Assessment Team
Grade	D

Employees directly supervised (if applicable):	None
Family Tree (job titles only, no employee names)	
Finance Process Lead ↓ Financial Assessment Manager RBKC ↓ 3 x Financial Assessment Officers	

1. JOB PURPOSE:

To undertake financial assessments for individuals receiving Adult Social Care services, ensuring accurate calculation of client contributions in accordance with legislation, statutory guidance and Council policies. The postholder will collect, verify and assess financial information, maintain accurate records using the Council's case management systems, and provide advice and support to service users, their representatives and professionals regarding the financial assessment and charging process.

2. DESCRIPTION OF DUTIES:

- Calculate client assessed charges for Adult Social Care services.
- Maintain and update the Mosaic system to produce and issue financial assessment notifications and related correspondence.
- Arrange and undertake visits to service users in their homes, or meet with their representatives, to explain the Council's charging policies and collect financial information relating to income, assets and expenditure.
- Complete financial assessments and calculate charges for individuals receiving chargeable care services.
- Ensure financial information is verified and appropriate supporting documentation is obtained, reviewed and retained.
- Provide advice and guidance to care managers, service users and their relatives or representatives on financial matters and the financial assessment process.
- Attend Client Care Review meetings as required.
- Review clients' financial circumstances and make referrals to Income Maximisation Services where appropriate.
- Undertake risk assessments prior to conducting home visits, ensuring any identified risks are appropriately managed.
- Ensure service users receive information in an accessible and appropriate format to support their understanding of the financial assessment process and charging arrangements.
- Arrange interpreters to attend meetings with service users where required.
- Demonstrate a commitment to promoting and implementing the Council's Equal Opportunities policies.
- Undertake any other duties commensurate with the responsibilities and grade of the post.

SELECTION CRITERIA/PERSON SPECIFICATION

Job Title:	Financial Assessment Officer
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Conditions to Note:

Candidates:

When completing your application form, please address your answers directly to each of the selection criteria below. This enables the panel to assess your ability to meet each criterion. It is essential that you give at least one example of your ability to meet each of the four Values and Behaviours: Putting Communities First, Respect, Integrity and Working Together.

Recruiting Managers:

The following values and behaviours are essential criteria in each post and must be addressed directly by candidates. The Guidance Notes on values and behaviours for managers give example questions to probe candidates in the interview and application stages of the recruitment process.

Values & Behaviours

The Royal Borough of Kensington and Chelsea has identified four key behaviours and values that should be demonstrated by all council employees. Successful candidates will show the ability to meet these behaviours.

A	Equal Opportunities Demonstrate an understanding of and commitment to Council policies in relation to Equal Opportunity, Customer Care and service delivery, and the ability to implement these policies in the workplace.
B	Qualifications
C	Skills; Experience and Attitude • Experience of undertaking Adult Social Care financial assessments, including the calculation of client contributions and assessed charges. • Comprehensive knowledge of Adult Social Care charging legislation, welfare benefits, income and capital assessments. • Experience of collecting, verifying and assessing financial information and supporting evidence. • Experience of working within a Local Authority Adult Social Care environment. • Experience of providing advice and guidance to service users, carers and professionals on financial assessment and charging processes. • Experience of maintaining accurate records and updating client information on electronic case management systems, including Mosaic or equivalent. • Excellent verbal and written communication skills, with the ability to explain complex financial information clearly and sensitively. • Ability to manage a caseload, prioritise workload and work independently to meet

	deadlines.
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Our Values & Behaviours	
D	PUTTING COMMUNITIES FIRST • We put local people at the heart of decision making in everything we do. • We seek to include and involve: all voices matter. • We provide quality services that are responsive, effective and efficient. • I actively support the council during significant emergency responses, always prioritising the needs of our residents. This may involve my participation in emergency efforts and, in exceptional circumstances, being redeployed to assist wherever I'm most needed. The following examples are indicators of effective behaviour: • I actively involve and include the communities that I serve in my work. • I shall reflect the views of the communities in my daily work. • I shall improve the service I provide through seeking feedback from others. Our residents will feel that: • I have been included • I can see how my views have been taken into account • I can see improvements and developments based on my input
E	RESPECT • We listen to everyone and value the personal experiences of people in our communities and of each other. • We adopt a fair, and involving approach regardless of any way in which an individual is different to us. The following examples are indicators of effective behaviour: • I adapt my approach to take account of all differences and cultures in the community and with colleagues. • I ensure I am equitable and fair by including those who are quiet or may not be able to represent themselves. • I communicate in a way that is respectful, encourages involvement and meets people's needs. Our residents will feel that: • I feel my culture and background are respected.

	• I have confidence that action is being taken. • I feel I am being treated fairly.
F	INTEGRITY • We act with openness, honesty, compassion, responsibility and humility. • We let people know what we are doing and communicate why and how decisions have been made. The following examples are indicators of effective behaviour: • I demonstrate empathy in my interactions with others. • I am honest and transparent about the decisions I take. • I follow through on the actions I say I will take and take ownership for communicating the outcome. Our residents will feel that: • I am told when something is not possible and the reasons why are explained to me. • I feel my perspective is listened to and understood. • I feel my views are valued
G	WORKING TOGETHER • We work together and in partnership with everyone that has an impact on the lives of our residents. • We want to understand, learn from each other and continually adapt. The following examples are indicators of effective behaviour: • I work with others to provide an effective service for residents, local communities and other departments within the Council. • I seek ways to work with other departments to deliver a seamless service and find opportunities to improve. • I seek out opportunities to learn from my colleagues and build on good practice. Our residents will feel that: • I can get my issue resolved without being passed around departments. • I find it easy to access the services that I need. • I feel the Council is open to new ideas.