Cumberland Council

Post Specification

Date	**January 2023**
PG Number	**6599**
Post Title	**Community Finance Officer**
Job Family	**Regulation and Technical**
Job Family Role Profile	**PCD8ii**
Final Grade	**Grade 9 (inc JWC's)**

To be read in conjunction with the job family role profile

Service Area description

The core purpose of the adult social care & support operations within the Health, Care and Communities directorate is to help people to achieve the outcomes that matter to them in their life. Our primary functions are to safeguard people from harm, to assess people's needs and co-produce support plans that enable people to reach positive outcomes in their lives as we carry out our statutory duties, primarily under the Care Act 2014.

The role of the Community Finance team is to ensure that customers are accurately financially assessed, supported to ensure they are maximising their benefits, can access direct payments where eligible, assist them to gather the financial information required and provide advice and support to the customer and/or their representatives. The team also work closely with colleagues and other agencies such as the Court of Protection to identify where possible financial abuse or intentional deprivation has occurred, implement debt recovery procedures where necessary.

Purpose of this post

To provide a holistic financial service to people requiring social care in order that people understand the personal budget, direct payment & financial assessment mechanisms. Work with people to maximise their income, undertake financial assessments and introduce direct payment arrangements.

Key job specific accountabilities

1. Financial Assessments

a) Undertake an equitable financial assessment of an individual's ability to pay contributions to the cost of their care in line with Department of Health Guidelines and Directorate procedures (Finance Guidance Notes/HQ Circulars).

b) In line with any notification of a change in circumstances for an individual or at least on an annual basis undertake a reassessment of their ability to pay their assessed financial contribution.

c) Notify the individual of the outcome of the financial assessment. Where a resident has no entitlement to public funding for residential care, calculate the date when such funding may be provided.

2. Direct Payments

a) Advise Adult Social Care staff, individuals or their representatives and relevant external organisations on the operation of Adult Social Care Direct Payments process.

b) Support Locality Teams in validating costing plans. Oversee and implement the administrative arrangements in creating, amending and ending a Direct Payment.

c) Assist with reviews of existing arrangements through providing information and attending review visits, and attend case conferences where necessary.

d) Work with District Support Administrators to facilitate appropriate monitoring of Direct Payments in line with contractual agreements and respond to change requests in line with departmental procedures. As required audit an individual's system for the operation of Direct Payments by visiting the individual at home.

3. Collection of financial information

a) Interview the individual and/or their financial representative at their home or at a mutually agreed venue to obtain the necessary information about their financial (and legal) circumstances to enable a financial assessment to be undertaken. Verify the information obtained.

b) Carry out a benefits check and provide advice and assistance to complete application forms where appropriate for welfare benefits to be claimed.

4. Income recovery

a) Advise the individual and/or their representatives about the invoicing processes and payment methods. Instigate the debt raising and invoicing procedures.

b) Working with District Support Administrators monitor an individual's account and, where appropriate, apply debt recovery procedures or arrange refund of overpayments.

c) Where appropriate request the registration by Legal Services of legal charges on residents' properties in order to secure outstanding debt.

5. Client Services

a) Offer support to an individual and their families in claiming benefit entitlement. On behalf of the department administer the responsibilities of corporate appointee or signing agent for an individual unable to deal with their own welfare benefits.

b) Identify where authority under Court of Protection is required to administer an individual's finances.

c) Take appropriate action where a vulnerable adult is at risk of financial abuse or where their affairs are not being administered correctly in accordance with safeguarding procedures.

6. Record Keeping/Management Information

Ensure data is coded and recorded in an accurate and timely way in appropriate systems to enable budget monitoring and the production of good quality management information to support the work of the District and Locality Team Managers and the wider Department.

7. Relationship with others

a) Work closely with district and locality staff to ensure the provision of a quality service to an individual and their representatives, including giving advice on benefit entitlement.

b) Liaise where necessary with colleagues in other Council Directorates and with colleagues in other agencies, DWP and voluntary agencies and providers of care.

c) Respond appropriately with sensitivity to queries from individuals, their representatives and members of the public, giving due consideration to their vulnerability.

8. Project work/other duties

a) Undertake other duties including as necessary work on specific time-limited projects within agreed parameters in order to promote improvements in information systems and processes to facilitate effective management decision making.

b) As directed by the line manager provide cover for colleagues in other Locality Teams to ensure that Financial assessment and Direct Payment processes are maintained at all times and to ensure that varying workload pressures are effectively managed.

9. Health and Safety

a) Maintain a working knowledge of health and safety legislation and regulations and the Council's policies and procedures. Take appropriate action, including undertaking risk assessments, investigations and reviews and report as necessary with regard to meeting the health, safety and welfare requirements of staff, clients and members of the public and for premises and equipment in the district office.

b) The postholder is required to undertake work in a person's own home and must fully comply with the department's lone working policy and agreed risk assessments.

10. Personal Development

The postholder will be required to take part in a structured scheme of performance planning and appraisal, linked to a personal training and development plan.

11. Development of the organisation

The postholder is expected and enabled to contribute more widely to the overall development of the Department and its services through training work, special projects and other activities, both to promote the postholder's own development, and so that knowledge and experience in the Department are effectively shared, to the overall benefit of the service.

Please note annual targets will be discussed during the appraisal process

Key facts and figures of the post	
Budget Responsibilities	• None
Staff Management Responsibilities	• Provide Instruction and training in areas of work as necessary
Other	• None

Essential Criteria - Qualifications, knowledge, experience and expertise

- Relevant recent experience working in an administrative or financial office environment
- Financial Management experience.
- 5 GCSE's at C grade or above including English and Mathematics, or an equivalent level qualification.
- NVQ3 in Customer Care/Business Skills or equivalent in relevant subject, or substantial relevant experience.
- An understanding of financial procedures.
- Overview of welfare benefits
- Understanding of Welfare Rights
- Understanding of Direct Payments
- Use of IT applications including databases, word processing, advanced spreadsheets.
- Able to prioritise own work and work to strict deadlines
- Good working knowledge of administrative systems and ability to follow established procedures.
- Ability to analyse, develop and maintain accurate systems.
- Ability to handle, analyse and interpret complex, complicated information accurately and with attention to detail
- Excellent customer care skills
- Ability to travel around the County
- Experience of working within the public or voluntary sector
- Public sector financial systems and procedures regulations.
- Knowledge of the role of Adult and Local Services and Local Government
- Overview of relevant legislation
- Ability to manage projects
- Report writing

Disclosure and Barring Service – DBS Checks

- This post requires a DBS check.
- The level of check required is:
  - DBS Basic

Job working circumstances

Emotional Demands	• Some working with vulnerable / distressed service users and/or families, including in service users' homes
Physical Demands	• None
Working Conditions	• Some working with service users and/or families who may be upset or angry

Other Factors

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