

# Job Description

Role Profile	Social Care Financial Assessment Officer (ASC009)
Service/Team	Finance, Estates and Benefits – Benefits & Welfare
Reports to	Revenue / Benefits Team Manager
Responsible for	N/A
Number of posts	3
Post number	
Career Grade	N/A

**My job improves the quality of life for the people of Bournemouth Christchurch and Poole by ensuring that financial referrals and subsequent assessments are delivered promptly, balancing the need to support the delivery of a personalised service to clients and their families with the need to protect the council's financial interests.**

## Job Overview

You will be:

- applying national charging regulations to financially assess a person's contribution towards their social care services
- working with care managers and others in Adult Social Care (ASC) to support the client holistically in terms of assessing and reviewing both care needs and financial contributions
- using your expertise to provide welfare benefits advice to clients to enable them to manage their finances and maximise the council's income
- ensuring that a client's financial contribution is accurately reflected in the net sum for care due to be paid to providers

## Key Responsibilities

- Work with clients and/or their representatives (in person or indirectly) to calculate the amount a client should contribute to the cost of their social care services by determining their capital, property and income for charging purposes, some of which can be complex and require Legal input.
- Calculate any monies due to the Local Authority due to overpayments made to providers or underpayments by clients and their representatives, and work with appropriate staff to raise invoices accordingly
- Liaise with clients and/or their representatives, care management staff and managers, providers and internal Council teams to ensure clients' financial assessments and related charges are applied equitably and in accordance with national and local regulation and policy
- Apply and administer ASC and corporate policies to deliver supporting services and requirements such as:
  - the Deferred Payment Scheme
  - Third Party Top-ups
  - Assessing client's ability to repay debts owed
  - Working with Legal on cases where it is suspected that the client or representatives are attempting to exclude assets from the financial assessment
- Take part in regular quality-checking of colleagues' calculations

- Working with care managers and Service Development staff to provide specialist advice helping a client understand charges and the options available to them such as top-ups and deferred payments, including encouraging them to repay any debts they may have to ASC for their contributions
- Support individuals to access welfare benefits where they are eligible but not claiming
- Ensuring that any suspected Adult Protection Safeguarding issues are escalated through appropriate channels
- Signposting clients to independent financial advice when appropriate
- Provide procedural advice and support to social work teams, ASC senior managers, clients and their relatives on financial assessments, contributions and welfare benefits
- Provision of the above services to self-funding clients on a chargeable basis as required
- To maintain essential records of client visits, prepare and produce paperwork and use appropriate computerised systems
- To maintain effective working relationships with partner organisations, clients and their families or other representatives, solicitors, colleagues within ASC

---

### **Specific Qualifications and Experience**

- A Levels or NVQ Level 3 or equivalent.
- Knowledge of processes and procedures relating to social care finance.
- Knowledge of the calculations and criteria against which individual's finances are assessed.
- Awareness and knowledge of financial support options available regarding social care.
- Experience of undertaking technical administrative work.
- Experience of providing advice and information to service users.
- Ability to provide advice and information, and to communicate efficiently with a range of service users and stakeholders using empathy and tact.
- Ability to manage workload and reprioritise tasks according to need and urgency.

### **Personal Qualities & Attributes**

- Ability to maintain composure and concentration when undertaking assessments and recording information
- Ability to communicate and deal with distressed individuals and their families who may be confrontational or present challenging behaviour
- Ability to deliver difficult and potentially contentious decisions that may cause distress to the individuals or their families

### **Job Requirements**

- DBS check
- Ability to travel around the BCP Council and surrounding area in an agreed timely manner.