

ROYAL BOROUGH OF GREENWICH

JOB DESCRIPTION

DEPARTMENT Health & Adult Services **POSTHOLDER**

SECTION Personalised Support and HAS Financial Services **GRADE** PO1

POST DESIGNATION (TITLE) Financial Assessment & Welfare Benefits Officer

Purpose of Job:

To be responsible to the Team Leader HAS Finance and to be accountable to delivery of:

- i) Comprehensive financial assessment and review of people who draw on Adult Social Care services (or their representatives), including verification of assets, income, and expenses, determining each person's ability to pay towards their social care, and their need for additional funding.
- ii) Providing in-depth information, advice and support on maximising welfare benefit take-up to people subject to financial assessment, optimising income to the Council from social care charges.
- iii) Preventing debt and non-payment of charges, financial abuse and fraud by providing early intervention, case management and review, liaison with related teams and referral to appropriate services.

Manages up to 5 indirectly managed staff.

Manages up to 0 indirectly managed consultancy/contracting staff.

Main Duties:

- 1) Explain all relevant aspects of social care charging legislation, policy and processes to people who draw on care and support and/or their families or representatives, adapting language and using digital and printed resources to enable people to understand and remain clear at all times about their rights and responsibilities and participate successfully in the assessment process.
- 2) Provide prompt, clear and responsive customer service, responding to queries from residents and their representatives as well as colleagues in the Department and elsewhere, ensuring concerns are investigated and acted on at the earliest stage- and are recorded and escalated where needed.
- 3) Keep abreast of legislative and local and national policy changes and best practice in Adult Social Care in general- and specifically in regard to charging and financial

assessment, ensuring knowledge is shared within and outside the team, enabling the service to adapt to new requirements.

- 4) Undertake financial assessments either remotely, at the person's home or other venue depending on their needs. Ensure assessments comply with current regulations, guidance, confidentiality and data protection, adopting a proportionate and personalised approach to assessment depending on the person's capability and financial situation, determining assets, income and relevant expenditure for the purposes of social care charging.
- 5) Assist people to complete self-assessment where required, and undertake investigation and verification of financial self-assessments, eliciting and analysing further evidence, cross-checking with information from the Council's databases, and those of Department of Work and Pensions and HMRC.
- 6) Undertake reviews of financial assessments where people's financial circumstances or care setting have changed, where there are expenses, income or capital previously unaccounted for, or where the person or their representative are unsatisfied with their assessment or feel unable to pay their assessed charge. Make recommendations for any discretionary amendments to assessed maximum charges.
- 7) Maintain a detailed understanding of current welfare benefits eligibility criteria and of available discretionary payments- understanding how these impact on each other and on household costs. Provide targeted welfare benefits advice and support to people who draw on care and support services or will do so in future, enabling them to maximise their income and that of the Council. Provide assistance to complete and submit claim forms, and represent people where required at appeals and tribunals.
- 8) Provide early intervention, case management and referral to the appropriate teams and services in the case of non-payment/ debt accruing, where there may be Fraud or Safeguarding concerns (such as financial abuse), or where the person appears to lack Mental Capacity to manage their financial affairs and no legal arrangements are in place.
- 9) Develop effective working partnerships, liaising with relevant Council teams and officers across HAS and other Directorates, with Central Government Departments, health and social care providers, those providing advice and advocacy to residents, representing the team and the Council at meetings as required, and informing colleagues of changes to legislation, policy, and financial assessment and review processes where needed.
- 10) Provide specialist advice on financial areas related to (for example) Adult Social Care charging including property disregards, beneficial and legal ownership of capital, deprivation of assets, disability related expenditure, self-funder administration fees and Continuing Health Care eligibility as well as Deferred Payment arrangements, signposting to external financial advice services where appropriate.
- 11) To manage complaints, disability related expenditure appeals, welfare benefit appeals and in some instances attend court hearings.
- 12) Be responsible for instructing legal services where proceedings are to be issued (deprivation, property disputes, ordinary residents status) and arrange meetings with

legal and clients or their representatives. Attend Court hearings in relation to these matters if needed.

- 13) To undertake investigations including those of a complex, confidential and sensitive nature including regarding Financial abuse and Safeguarding cases. This may require the collection of clients valuable items from place of assessment.
- 14) To undertake any other work appropriate to the level and general nature of the post's duties.
- 15) Where necessary for the job role or appropriate for continued development in the role, the post holder may be required to participate in training and development courses made available via the Council's Apprentice Levy funding.
- 16) To undertake all duties with due regard to the provisions of health and safety regulations and legislation, Data Protection/GDPR, the Council's Equal Opportunities and Customer Care policies.
- 17) To perform all duties in line with Council's staff values showing commitment to improving residents lives and opportunities, demonstrating respect and fairness, taking ownership, working towards doing things better and working together across the council.
- 18) This post requires an Enhanced DBS with adults barred list and will be supported by Safer Recruitment tools
- 19) To undertake induction and training for staff joining relevant teams, and supervision/management of apprentices or trainees as and when required.
- 20) You may be required to undertake alternative or additional duties from time to time or transfer to another service department within the Council as the Council may reasonably direct to meet service user demand in the event of a crisis or emergency.

Designation of the Post to which the Post-Holder normally reports to:
Team Leader HAS Finance



Person Specification

Job Title	Financial Assessment & Welfare Benefits Officer
Grade	PO1
Service/Section	Personalised Support and HAS Financial Services
Directorate	Health & Adult Services

Shortlisting Criteria: Essential criteria assessed via application form should be used to shortlist.

Criteria	Essential/ Desirable
Knowledge	

1. Good knowledge of health and social care systems and understanding of how care services are commissioned and provided	Desirable
2. Excellent knowledge of welfare benefits and state pensions, including eligibility and application and appeal processes.	Essential
3. Excellent knowledge of Care Act Legislation, other relevant Statutory Guidance and regulations regarding Adult Social Care financial assessment and charging	Essential
4. Good knowledge of the Mental Capacity Act 2005 and its application to safeguarding from financial abuse	Desirable
Skills and Abilities	
5. Strong customer service skills with the ability to communicate effectively with members of the public when offering advice, including the ability to address challenging subjects and deal sensitively with people under stress.	Essential
6. Ability to analyse and assess complex financial information presented in a wide variety of formats, using it to make informed decisions	Essential
7. Strong digital processing skills using a variety of software applications and ability to work effectively across complex systems.	Essential
8. Excellent written English with the ability to compose accurate and clear emails, letters, reports and case notes. Ability to present complex information in a clear way to a wide variety of audiences including giving evidence at tribunals and appeals	Essential
Experience	
9. Experience of working in health, social care, welfare benefits or financial advice	Desirable
10. Experience of working with office systems	Desirable
Equal Opportunities	
11. Understanding of and commitment to the Council's equal opportunities policies and ability to put into practice.	Essential
12. Understanding of and commitment to achieving the Council's staff values and ability to put into practice in the context of this post.	Essential