



Job Profile

September 2025

JOB TITLE: Financial Assessment Officer

GRADE: Scale 5 - 6

POST NO: XXX

JOB TIER: 5 (non-management)

DBS CHECK: Standard

GROUP: Finance

SERVICE: Transactional Finance

REPORTING STRUCTURE

Reports to: Senior Financial Assessment Officer

Direct Reports: None

Indirect Reports: None

ROLE PURPOSE:

Part of a team dealing with the prompt and accurate production of client financial assessments and reassessments for Adult Social Care clients; ensuring that financial regulations and statutory obligations are met.

A. Job Description

1. People Management

- No direct supervisory responsibility however may be requirement to assist in induction and training of peers and new employees.

2. Resident & Community Contribution

- To demonstrate understanding of the Council's *Customer Care Standards* and ensure that these standards are met in order to deliver the Council vision of 'putting our residents first'.

3. Operational Service Delivery

- Follow process maps to ensure financial assessments are calculated correctly, in a timely manner, and income is maximised in all instances.
- Deal with customer enquiries, generated via telephone calls, letter, e-mail or face to face.
- Maintaining data integrity on all systems and comply with data protection.
- Manage own work load and ensure tight and often conflicting deadlines are met.
- Ensure all opening and closing business processes are carried out in accordance with set procedures and ensure all daily and other periodic tasks are completed to the required standards.
- Input accurate data, for the timely production of financial assessments and subsequent bills, in accordance with existing process map and timelines.
- Gain knowledge of relative legislation such as The Care Act 2014, in order to deal with queries in a confident manner.
- Work closely with the Senior Financial Assessment Officer to ensure development goals are met, in line with set targets.
- Train and advise staff in the team, and in other service areas, on the procedures and requirements relating to financial assessments.
- Ensure that system data integrity is maintained by identifying and correcting all anomalies.
- Assist with the monthly billing run process.
- Deals with reconsiderations, in relation to financial assessments.

4. Service Planning & Development

- Maintain knowledge of the current Team Plan and understanding of own contribution in order to ensure delivery of this plan.

5. Financial & Resource Management

- To demonstrate cost-consciousness and identify any cost effective changes to own way of working.

6. Continuous Improvement

- To identify and suggest any improvements to current ways of working in order to deliver a more efficient and effective service for customers.

7. Contacts

- Develop and maintain good working relationships with key colleagues working in various teams, both internal and external.

8. Additional Responsibilities

- Complete other reasonable tasks in order to fulfil role purpose or as instructed by management.

9. KEY PERFORMANCE INDICATORS

- PADA performance targets

Additional duties to be performed to progress to Scale 6

- Keep abreast of and expand knowledge of legislation, in order to deal with more complex queries and support other staff, in dealing with such queries.
- Ability to prioritise more complex cases whilst ensuring all other work is processed within the set timelines.
- Have a full and detailed understanding of the financial assessment process for non-residential and residential services.
- Have a full and detailed understanding of ContrOCC, in relation to financial assessments.
- Provide training and assist with the induction and monitoring of new staff.
- Deputise, when required, for the Senior Financial Assessment Officer.
- Understand and contribute to the operation of the whole Financial Assessment Team; making suggestions for improvements.

B. Person Specification

Financial Assessment Officer

This person specification will be used for recruitment to the Financial Assessment Officer vacancy. It will form the basis of the application form. Candidates will be also assessed against aspects of this person specification at interview.

1. QUALIFICATIONS	ESSENTIAL	DESIRABLE	SCALE
Good standard of education to Grade C in GCSE Maths and English and one other subject or equivalent qualification	✓		5, 6
2. STATUTORY or ROLE SPECIFIC REQUIREMENTS	ESSENTIAL	DESIRABLE	SCALE
Ability to learn, understand and apply legislation as required for the role	✓		5, 6
3. EXPERIENCE	ESSENTIAL	DESIRABLE	SCALE
Experience of working within a financial environment in a large organisation for more than two years.	✓		5, 6
Experience of working with customers particularly those with additional needs due to disability or age.	✓		5, 6
4. KNOWLEDGE & SKILLS	ESSENTIAL	DESIRABLE	SCALE
Good keyboard skills for timely and accurate data entry	✓		5, 6
Ability to deal with situations and information with tact and discretion whilst adhering to data protection principles	✓		5, 6
Accuracy and attention to detail in order to deal with some mundane, repetitive tasks without compromising quality	✓		5, 6
Ability to work with minimum supervision and use your initiative in decision making	✓		5, 6
Ability to work under pressure and multi task to meet deadlines	✓		5, 6
Good analytical skills in order to identify errors or anomalies in reports	✓		5, 6
Ability to deal with a high volume of incoming phone calls whilst maintaining individual work trays, ensuring all allocated work is processed within set timelines.	✓		5, 6

5. COMPETENCIES	ESSENTIAL	DESIRABLE	SCALE
“Can do” positive attitude Demonstrates a commitment to changing work practices and processes, and a willingness to try new ways of working or thinking.	✓		5, 6
Takes responsibility and delivers results Adapts to changing demands to ensure that objectives are met, overcoming problems and making well considered decisions.	✓		5, 6
Team working Acts as a role model to others in the team, sharing knowledge and experience when necessary, whilst respecting and valuing the contribution other team members' experiences can bring.	✓		5, 6
Communication Demonstrates well developed written and verbal communication skills; and the confidence to present reports and verbal accounts credibly to a variety of different audiences.	✓		5, 6
Customer Care Develops contacts and relationships with customer/ client groups, regularly reviewing service delivery and taking responsibility to ensure quality service provision.	✓		5, 6
Takes ownership of personal development Takes action to develop own and others' capability and knowledge by promoting and supporting developmental opportunities to improve performance.	✓		5, 6