



# HILLINGDON

LONDON

## Job Profile

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**JOB TITLE:** Transactional Finance Visiting Officer

**GRADE:** Scale 6

**POST NO:** 30797

**JOB TIER:** 5 (non-management)

**DBS CHECK:** Enhanced

**GROUP:** Financial Assessment Team

**SERVICE:** Transactional Finance

### REPORTING STRUCTURE

**Reports to:** Senior Financial Assessment Officer

**Direct Reports:** None

**Indirect Reports:** None

### ROLE PURPOSE:

Based in the Financial Assessment Team, the post holder will visit residents in the community to assist with finance form completion and gathering documents. The post holder will also maximise income through promoting welfare benefit take up.

# A. Job Description

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## 1. Resident & Community Contribution

- Demonstrate an 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'.
- Assist clients with their enquiries primarily in person recognising that some queries would need to be dealt with by telephone or in writing. Some residents may be elderly or have varying physical and/or mental disabilities; therefore, a high level of customer service skills must be delivered.

## 2. People Management

- No direct supervisory responsibility. However, may be required to assist in the induction and training of peers and new employees.

## 3. Operational Service Delivery

- Ensure that all business processes are carried out in accordance with procedures to ensure that all daily and other periodic tasks are completed to the required standards.
- Ensure that all incoming documentation meets the necessary criteria for accurate system input.
- Visit clients at home or assist them over the telephone to help complete finance forms and give benefit advice as appropriate.
- Undertake a holistic approach when visiting clients in their own environment, referring to other agencies or departments if appropriate.
- Accurate and fast data entry.
- Carry out financial assessments for pre-service and active cases, in accordance with service requirements and demand.
- Provide a full range of administrative support to assist with financial assessment processes.
- Maintain a flexible approach in relation to demands made by the service, which may include carrying out visits for other teams.
- Maintain an understanding of Hillingdon council's charging policy for Adult Social Care clients and Care Act legislation.
- Maintain an understanding of welfare benefits and the impact on Adult Social Care clients.
- Be receptive to change, particularly technological enhancements.
- Run reports on a range of databases to assist management in performance management, statistical analysis and the maintenance of data quality.
- Carry out all duties in compliance with GDPR and maintaining confidentiality.
- Ensure that customer enquiries are dealt with in an efficient, speedy and helpful manner and are resolved to the satisfaction of the customer.

- Assisting with a range of reports to support managers in performance monitoring, maintaining statistical data and to ensuring data quality.
- Communicating with other departments and agencies by telephone, in writing and face to face.

#### • **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**

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

#### **6. Service Improvement**

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

#### **7. Contacts**

- Internal – all levels of staff
- External – Public and private bodies, business partners, members of the public.

#### **8. Additional Responsibilities**

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

## B. Person Specification

### Transactional Finance Visiting Officer

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This person specification will be used for recruitment to this post. It will form the basis of the application form, and candidates will be also assessed against aspects of this person specification at interview.

<b>1. QUALIFICATIONS</b>	<b>ESSENTIAL</b> ✓	<b>DESIRABLE</b> ✓
Good standard of education to at least a grade C/grade 4 in five GCSE's including Maths and English or equivalent qualification.	✓	
<b>2. STATUTORY or ROLE SPECIFIC REQUIREMENTS</b>	<b>ESSENTIAL</b> ✓	<b>DESIRABLE</b> ✓
None.		
<b>3. EXPERIENCE</b>	<b>ESSENTIAL</b> ✓	<b>DESIRABLE</b> ✓
Experience of using Excel and other IT packages.	✓	
Experience of lone working and working with vulnerable members of the public in their own environment.	✓	
Experience of working with customers particularly those with additional needs due to disability or age.	✓	
Experience of managing your own work diary to ensure deadlines are met and time management skills used positively.	✓	
<b>4. KNOWLEDGE &amp; SKILLS</b>	<b>ESSENTIAL</b> ✓	<b>DESIRABLE</b> ✓
Excellent data entry skills ensuring speed and accuracy levels are maintained.	✓	
Ability to learn, understand and apply legislation and processes as required for the role.	✓	
Ability to deal with situations and information with tact and discretion whilst adhering to data protection principles.	✓	
Ability to communicate effectively in writing, face to face and over the telephone.	✓	
Accuracy and attention to detail in order to deal with some mundane, repetitive tasks without compromising quality.	✓	
Ability to work with minimum supervision and use initiative in decision making.	✓	
Ability to work under pressure and multitask to meet deadlines.	✓	
Ability to work flexibly and provide cover for colleagues when required ensuring that levels of service are maintained.	✓	

Knowledge of Adult Social Care.		✓
Knowledge of financial assessments and welfare benefits.		✓
<b>5. COMPETENCIES</b>	<b>ESSENTIAL</b>	<b>DESIRABLE</b>
<b>“Can do” positive attitude</b> Demonstrates a commitment to changing work practices and processes, and a willingness to try new ways of working or thinking.	✓	
<b>Takes responsibility and delivers results</b> Adapts to changing demands to ensure that objectives are met, overcoming problems and making well considered decisions.	✓	
<b>Team working</b> 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.	✓	
<b>Communication</b> Demonstrates well developed written and verbal communication skills; and the confidence to present reports and verbal accounts credibly to a variety of different audiences.	✓	
<b>Customer Care</b> Develops contacts and relationships with customer/ client groups, regularly reviewing service delivery and taking responsibility to ensure quality service provision.	✓	
<b>Takes ownership of personal development</b> Takes action to develop own and others' capability and knowledge by promoting and supporting developmental opportunities to improve performance.	✓	