# EAST SUSSEX COUNTY COUNCIL JOB DESCRIPTION

# JOB TITLE: Financial Assessment Assistant

# DEPARTMENT: Adult Social Care and Health

# LOCATION: Eastbourne

# GRADE: [Single Status Grade 5](https://new.eastsussex.gov.uk/jobs/benefits/east-sussex-single-status)

# RESPONSIBLE TO: Senior Financial Assessment Coordinator

# Purpose of the Role:

The Finance & Benefits Assessment team calculates what people need to pay towards care and support services arranged by Adult Social Care in with the [Care Act](https://www.legislation.gov.uk/ukpga/2014/23/contents/enacted). The team provide support to clients of Adult Social care, the public and Adult Social care practitioners.

The team complete ‘financial assessments’ to ensure the correct level of financial assistance is provided to our clients and the appropriate income is received by the department. As part of the process, we help clients identify additional benefit entitlement.

This role is to provide general support to the team, including dealing with inbound and outbound communication, completing basic financial assessments and ensuring appropriate billing. This is an entry level role that would give a good foundation knowledge for anyone looking to pursue a career within the department.

# Key tasks:

1. Handle inbound and outbound communication including telephone calls, emails and post.
2. Maintain accurate records of all interactions regarding clients in the appropriate database.
3. Process financial assessment requests from Adult Social Care practitioners to ensure the appropriate financial assessment is completed.
4. Complete basic financial assessments including ‘light-touch’ financial assessments.
5. Provide advice and guidance to our clients, the public, external organisations and Adult Social Care practitioners on charging for care services.
6. Process regular reports to ensure financial assessments are correctly set and billing is set appropriately.
7. Obtain welfare benefit information from the Department for Work and Pensions.
8. Provide support with more complex financial assessments, including documenting financial information provided.

# EAST SUSSEX COUNTY COUNCIL PERSON SPECIFICATION

# Essential key skills and abilities

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| These criteria will be assessed at the application and interview stage |
| * Ability to record proficiently whilst gathering information via the telephone. * Ability to maintain accurate records of all interactions regarding clients / work electronically. * Ability to make decisions as required within the remit of the role and refer complex cases requiring decisions. * Practical problem-solving skills. * Manage own workload and prioritise as required. * Ability to work under own initiative with a high degree of accuracy. * Ability to manage constant and conflicting demands, often to meet tight deadlines. * Ability to work constructively with colleagues, both internal and external and as part of a team. |

# Essential education and qualifications

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| These criteria will be evidenced via certificates, or at interview |
| * [QCF level 2](https://www.accreditedqualifications.org.uk/qualifications-and-credit-framework-qcf.html) in Maths and English or able to pass competency assessment as part of the selection process. |

# Essential knowledge

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| These criteria will be assessed at the application and interview stage |
| * Working knowledge of Microsoft Office, in particular Outlook, Excel & Word. * Awareness of the needs of vulnerable people. |

# Essential experience

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| These criteria will be assessed at the application and interview stage |
| * Understanding of the importance of good customer service. * Managing a workload with deadlines. * Experience of inbound and outbound telephone handling. |

# Other essential criteria

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| These criteria will be assessed at the application and interview stage |
| * Collaborative. * Empathetic. |

**Date drawn up: May 2022**

**Name of Officer(s) drawing up person specifications: Spencer Crouch**

**Job Evaluation Reference: 7553**

Health & Safety Functions

This section is to make you aware of any health & safety related functions you may be expected to either perform or to which may be exposed in relation to the post you are applying for. This information will help you if successful in your application identify any health-related condition which may impact on your ability to perform the job role, enabling us to support you in your employment by way of reasonable adjustments or workplace support.

| **Function** | **Applicable to role** |
| --- | --- |
| Using display screen equipment | Yes |
| Working with children/vulnerable adults | Yes |
| Moving & handling operations | No |
| Occupational Driving | No |
| Lone Working | No |
| Working at height | No |
| Shift / night work | No |
| Working with hazardous substances | No |
| Using power tools | No |
| Exposure to noise and /or vibration | No |
| Food handling | No |
| Exposure to blood /body fluids | No |