



Job description	
Job title	Financial Assessment and Visiting Officer
Grade	G
Directorate	Exchequer
Section/team	Financial Assessment Team
Accountable to	Financial Assessment Team Manager
Responsible for	N/A
Date reviewed	08.12.23

### Purpose of the Job

The post-holder will be part of a specific team dealing with all aspects of Benefits administration and means tested financial assessments in line with relevant Acts, Regulations, Council Policies, best practice, and performance targets.

The post-holder will assist customers in making claims for means tested support, undertake financial assessments, calculate special guardianship orders and advise on charges that will be levied for social care services, and carry out welfare benefit checks, advising of entitlement to and assisting with making claims for other State Benefits. The postholder may be required to carry out a range of home visits to service users and potential service users throughout the Borough when the need arises.

The post-holder will assist with the provision of an efficient, effective, responsive and customer-focused service to clients and the Council. This includes signposting customers to other relevant advice agencies, supporting them to access other services and assistance where a need has been identified and taking part in initiatives to promote Benefit take up throughout the borough.

The post will require work outside of normal hours of duty.

### Duties and Responsibilities

This is not a comprehensive list of all the tasks, which may be required of the post holder. It is illustrative of the general nature and level of responsibility of the work to be undertaken.

1. Conduct a range of home visits, as required. Visits will normally be unaccompanied unless the visit falls into the agreed criteria for paired visits or the necessity for a paired visit is agreed with the Joint Services Team Manager. Visits will include working outside of normal hours.



2. Undertake financial assessments, calculate any charges to be levied, produce all necessary documentation, and advise service user accordingly
3. Update and maintain computerised records in accordance with Benefits' and Charging procedures.
4. Produce case reports following visits, as required.
5. Provide explanations of Benefit entitlement, financial assessments and social care charges.
6. Control own workload ensuring that visiting targets are achieved.
7. Maintain statistical information in relation to visits undertaken.
8. Initiate contact with customers via the appropriate media to achieve team and individual objectives.
9. Assist claimants with form completion and verify and record original documents seen during visits.
10. Conduct Welfare Benefit checks to advise claimants of any other benefits that they may be entitled to.
11. Participate in income collection and debt management
12. Liaise with internal and external customers and/or organisations, as necessary.
13. Identify cases of suspected fraud and refer cases for appropriate action.
14. Participate in joint exercises with other Agencies to promote Benefit take up as required.
15. Participate in projects designed to improve the quality of service provided, including testing of new/upgraded computer systems.
16. Assist with ensuring effective team communication and participate fully in the Departmental Communication Strategy.
17. Actively participate in the Performance Review and Development process, which contributes to Divisional, Team and Individual objectives.
18. Assist with the production of and adherence to procedure notes, manuals and documents and that these are accurately updated and reviewed on a regular basis.
19. Contribute to the production, implementation and monitoring of team plans and setting clear objectives, goals and targets to ensure that Divisional & Team Plans are met.
20. Participate in forums, meetings, presentations etc, when required, ensuring accurate information and / or minutes are taken, and monitor and follow-up actions
21. Participate in all aspects of training and personal development to improve effectiveness, efficiency and service delivery.
22. Any other duties commensurate with the grade that assists the Division in meeting its objectives and contributes to personal development.

### **Health and Safety**

- To use equipment as instructed and trained
- To inform management of any health and safety issues which could place individuals in danger



## Data Protection and Information Security

- Implement and act in accordance with the Information Security Acceptable Use policy and Data Protection Policy,
- Protect the council's information assets from unauthorised access, disclosure, modification, destruction or interference,
- Report actual or potential security incidents.

## Knowsley Better Together – Staff Qualities

The following qualities have been adopted by the Council and apply to all employees. You are expected to embrace and display these qualities.

- **Integrity.** You are required to be open and honest, maintain high standards of personal behaviour and display strong moral principles.
- **Accountability.** You must take personal responsibility for your actions and decisions and understand the consequences of your behaviour.
- **Communication.** You must listen and talk to others, taking account of other people's points of view. You should share information and strive to work together.
- **Respect.** You must treat people with care and dignity, observing the rights of other people, and helping and supporting others where you can.