

Role profile

Job Title:	Finance Officer (Visiting Officer)	Grade:	7
Department:	Community Benefits Team – Financial Assessments	Post no.:	57760
Directorate:	Resources	Location:	Perceval House / Hybrid

Role reports to:	Senior Finance Officer – Community Benefits Team
Direct reports:	None
Indirect reports:	None

Job description

Recruitment practices to safeguard and promote the welfare of children and/or vulnerable adults apply to this post in addition to the requirement to obtain a Disclosure and Barring Service (DBS) check.

Purpose of role

- To be responsible for assisting in all aspects of the welfare benefits function, including:
 - Visiting customers in their own homes on a regular basis to help complete the council's adults services financial circumstances form for care and support.
 - Maximising income to our customers, in accordance with legislation statutory requirements and the Council's policies and procedures.
 - Assist customers in the completion and submission of claim forms.
 - Assist in preparing for and attending benefit appeal tribunal hearings for customers.
 - Identify appropriate benefit entitlement for customers.

Key accountabilities

1. Maintain a comprehensive knowledge of Department for Work and Pensions (DWP) welfare benefits regulations, including Ealing's care and support charging policy, housing benefit and local welfare assistance schemes.
2. To process all customer applications to defined quality standards and specified timescales.

3. To work efficiently and be responsible for providing accurate and timely advice and guidance to the council's financial assessment team in relation to customers benefit entitlement.
4. To maximise income for customers due to them and the Council.
5. To give comprehensive advice on all aspects of welfare benefits as prescribed by the DWP.
6. To be responsible for effective liaisons and good working relations with other council departments. Namely, adults social work teams, financial assessment team, client financial affairs team, brokerage, placements, ealing direct and funding officer teams.
7. To assist the senior finance officer – community benefits team in liaisons with external and internal audit teams. Including the efficient filing and retention of documentation, maintaining appropriate audit trails for subsequent retrieval.
8. To assist in the review and update of all documentation, policies and procedures and compliance with statutory requirements in accordance with professional standards and the Council's policies and procedures.
9. To assist in the preparation of cabinet reports, responses to members' enquiries, freedom of information requests, subject access requests and customer complaints in relation to all aspects of the welfare benefits function as directed by the senior finance officer – community benefits team.
10. To be responsible for assisting the senior finance officer – community benefits team in the efficient preparation and production of timely and accurate routine and ad-hoc management information, in relation to all aspects of the welfare benefits function, required to support the planning and monitoring of service delivery and to meet internal and external reporting requirements.
12. To work proactively with colleagues and managers, contributing ideas and fully participating in team meetings.
13. To positively support change agendas by demonstrating flexibility and a willingness to take on new ideas and ways of working, including highlighting issues and making suggestions for improvement of business processes and efficiency.
14. Effective liaison with Government departments, statutory and external agencies such as the DWP, clients and their representatives.
15. To be responsible for the regular maintenance, update and monitoring of individual customer case records using MOSAIC (or equivalent). To record contacts with clients and their representatives, claim details outcomes and income generation values.
16. To assist in the development of welfare benefit related community initiatives, including liaison with community and advocacy groups.

17. To be responsible for ensuring the provision of appropriate, accurate and timely verbal and written welfare advice and guidance to clients and colleagues within the Council and within partner organisations, in accordance with the Council's policies, procedure and values.
18. To promote awareness of good financial practice and control and good practice and legislation in respect of data handling, and client confidentiality.
19. To be responsible for preparing complaint responses relating to the welfare benefits function, as directed by the senior finance officer – community benefits, in accordance with the Council's complaints procedure.
20. To work independently at home, customers' homes and at designated sites (Perceval House, other council buildings, health service offices) without day-to-day supervision, being pro-active and using initiative to organise and prioritise daily work schedules according to the priorities of the Community Benefits Team.
21. Undertake day to day work using best practice in customer care and exercising sensitive and appropriate communication skills with a diverse and inclusive community.
22. To be responsible for keeping up to date with the council's data protection guidelines, adult social care charging and DWP regulations and standards.
23. To assist the Senior Finance Officer – Community Benefits Team in the preparation and production of timely and accurate routine and ad-hoc management information required to support the planning and monitoring of the welfare benefits service delivery, to meet internal and external reporting requirements and to provide accurate and timely statistical information.
24. To be responsible for the promotion and implementation of the Council's policies and procedures including equalities, diversity and inclusion, health and safety, security and the use of personal data.
25. Other duties and responsibilities at a similar or lower level that may be allocated from time to time.

Key performance indicators

- Customers are offered appointments within 10 working days of referrals being received.
- All appointments for home visits are notified to customers no less than 10 working days before visits are undertaken.
- Return case papers for benefit and financial circumstances assessment within 2 days of them being received from clients.
- All telephone enquiries are answered within 24 hours or by next working day.
- 100% of procedures undertaken on behalf of customers, within the decision making and appeals system in DWP legislation, are undertaken within the statutory time limits.

Key relationships (internal and external)

- Financial assessment team
- Adults social care social work teams
- Other adult services teams (brokerage, placements, Ealing direct and funding officer team)
- Department for Work and Pensions and their staff
- Voluntary sector organisations and their staff (Age UK, Mencap etc.)

Authority level

- None

Person specification

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Essential knowledge, skills and abilities

1. To demonstrate a comprehensive knowledge of local government finance, Department for Work and Pensions legislation, including an understanding of financial administration and social security administration.
2. To demonstrate a comprehensive knowledge of financial procedures and processes, particularly local authority managed social care programmes, adult social care charging policies and central government welfare benefits.
3. To demonstrate a comprehensive understanding of equalities, diversity and inclusion, in relation to staff and service provision.
4. To demonstrate a comprehensive understanding of Health and Safety requirements, in relation to staff and service provision.
5. The ability to receive all appropriate training and guidance relevant to the post.
6. To demonstrate communicating effectively, in person, in writing and on the telephone. The ability to deal effectively with queries and to provide appropriate advice as required to staff, external agencies, clients and their representatives.
7. To demonstrate dealing with high volume workloads, ensuring attention to detail and accuracy is always maintained, in particular the keeping of accurate records relating to financial and social security work undertaken on behalf of customer and the Council.
8. The ability to deliver the service in a variety of forms and from a variety of sites. This will include visiting clients in their own homes on a frequent and regular basis and clients and /or professionals in hospitals, resource centres, various offices, regional appeals service tribunal centres etc.
9. The ability to use initiative and work effectively as part of a team within a large organisation, ensuring that targets and deadlines are achieved.
10. The ability to use mainframe IT workflow systems (e.g. MOSAIC or similar), create and maintain spreadsheet software, in particular MS Excel and an

ability to receive training on and then utilise specialist software used to deliver the visiting officer function.

Essential qualification(s) and experience

1. Experience of operating mainframe IT systems to manage customer caseloads to deliver services.
2. Experience of working in a team and using own initiative to undertake day to day tasks in line with the team's and the organisation's policies and procedures.
3. Experience of working in a face-to-face capacity with vulnerable customers and members of the public.
4. Preferable experience of representing client's interests in respect of negotiations undertaken on their behalf in the capacity of an advisor and/or advocate.

Values and behaviours

Improved life for residents	Trustworthy	Collaborative	Innovative	Accountable
• Is passionate about making Ealing a better place • Can see and appreciate things from a resident point of view • Understands what people want and need • Encourages change to tackle underlying causes or issues	• Does what they say they will do on time • Is open and honest • Treats all people fairly	• Ambitious and confident in leading partnerships • Offers to share knowledge and ideas • Challenges constructively and respectfully listens to feedback • Overcomes barriers to develop our outcomes for residents	• Tries out ways to do things better, faster and for less cost • Brings in ideas from outside to improve performance • Takes calculated risks to improve outcomes • Learns from mistakes and failures	• Encourages all stakeholders to participate in decision making • Makes things happen • Acts on feedback to improve performance • Works to high standards