

Post Specification

Post Specification - Key Information

- **Post Title: Community Finance Officer**
- **Date: February 2026**
- **Post Group Number: 8866**
- **Job Family: People, Care and Development**
- **Job Family Role Profile: PCD8ii**
- **Final Grade: 9**

To be read in conjunction with the job family role profile.

Service Area Description

The Community Finance function sits within the Council's Corporate Finance Directorate and is a key part of the operational delivery of adult social care, in assessing people's ability to pay towards their care and support in line with legislation, statutory guidance and policy, supporting in safeguarding individuals where required and to maximise income to the Council.

The role of the Community Finance team is to ensure that customers are accurately financially assessed, supported to ensure they are maximising their benefits, to assist them to gather the financial information required and provide advice and support to the customer and/or their representatives in relation to charging for care and support. The team monitor and manage accounts to ensure timely payments are made to the Council and implement debt recovery procedures where necessary. The team work with internal colleagues and other external agencies such as the Court of Protection to identify where possible financial abuse or intentional deprivation has occurred.

Purpose of this Post

To provide a legal and compliant service to people who require social care and support through the Council in order that they understand the charging and financial assessment processes and are clear in terms of requirements, expectations and next steps. To maximise income for both the customer and the Council and to undertake financial assessments which result in the production of statements to the customer for payment and to ensure a robust, proactive account management approach in managing debt.

Key Job Specific Accountabilities

Financial Assessments

- a) Undertake an equitable financial assessment of an individual's ability to pay contributions to the cost of their care in line with The Care Act 2014 and Directorate policy and procedures (Guidance Notes/LAC Circulars).
- b) In line with any notification of a change in circumstances for an individual or at least on an annual basis undertake a reassessment of their ability to pay their assessed financial contribution.
- c) Notify the individual of the outcome of the financial assessment. Where a resident has no entitlement to public funding for residential care, calculate the date when such funding may be provided.

Direct Payments

- a) Advise Adult Social Care staff, individuals or their representatives and relevant external organisations on the charging element of the Adult Social Care Direct Payments process.

b) Assist with holistic reviews of existing arrangements through providing relevant information and attending review visits and attend case conferences where necessary.

Collection of financial information

- a) Upon referral, initiate the financial assessment process this may be via telephone, post or to arrange a visit to explain the financial assessment process for charging for care and support and to collect the required financial information to undertake a full and equitable financial assessment.
- b) Where necessary, interview the individual and/or their financial representative at their home or at a mutually agreed venue to obtain the necessary information about their financial (and legal) circumstances to enable a financial assessment to be undertaken.
- c) Utilise where appropriate and where consent is given, Searchlight to obtain relevant information and to validate information.
- b) Carry out a welfare benefit check and provide advice or make a referral to the DWP to complete application forms where appropriate for welfare benefits to be claimed.

Income recovery

- a) Advise the individual and/or their representatives about the invoicing processes and payment methods. Instigate the debt raising and invoicing procedures.
- b) Proactively monitor an individual's account and, where appropriate, apply debt recovery procedures.
- c) Arrange refund of overpayments where appropriate.
- d) Where appropriate request the registration by Legal Services of legal charges on residents' properties in order to secure outstanding debt.

Client Services

- a) Identify where authority under Court of Protection or Office of the Public Guardian is required to administer an individual's finances and notify the operational team/practitioner managing the client's case.
- b) Take appropriate action where a vulnerable adult is at risk of financial abuse or where their affairs are not being administered correctly in accordance with safeguarding procedures.

Record Keeping/Management Information

Ensure all information is recorded in an accurate and timely way in appropriate systems to ensure and evidence compliancy and clear audit trails and to enable the production of good quality management information.

Relationship with others

- a) Work closely with all key staff to ensure the provision of a quality service to the individual and their representatives.
- b) Liaise where necessary and appropriate with colleagues in other Council Directorates and with colleagues in other agencies, DWP and voluntary agencies and providers of care.
- c) Respond appropriately with sensitivity to queries from individuals, their representatives and members of the public, giving due consideration to their vulnerability.

Project work/other duties

- a) Undertake other duties including as necessary work on specific time-limited projects within agreed parameters to promote improvements in information systems and processes to facilitate and efficient and legally compliant service.
- b) As directed by the line manager provide cover for colleagues across the team to ensure that financial assessment processes are always maintained and to ensure that varying workload pressures are effectively managed.

Health and Safety

- a) Maintain a working knowledge of health and safety legislation and regulations and the Council's policies and procedures. Take appropriate action, including undertaking risk assessments, investigations and reviews and report as necessary with regard to meeting the health, safety and

welfare requirements of staff, clients and members of the public and for premises and equipment in the district office.

b) The postholder is required to undertake work in a person's own home and must fully comply with the department's lone working policy and agreed risk assessments.

Personal Development

The postholder will be required to take part in a structured scheme of performance management and appraisal, linked to a personal training and development plan.

Development of the organisation

The postholder is expected and enabled to contribute more widely to the overall development of the Department and its services through training work, special projects and other activities, both to promote the postholder's own development, and so that knowledge and experience in the Department are effectively shared, to the overall benefit of the service.

Please note: Annual targets will be discussed during the appraisal process.

Key Facts and Figures of the Post

- **Budget Responsibilities:** None
- **Staff Management Responsibilities:** Provide Instruction and training in areas of work as necessary
- **Other:** None

Essential Criteria

- **Qualifications:**
- 5 GCSE's at C grade or above including English and Mathematics, or an equivalent level qualification
- Level 3 qualification in Business Admin/Customer Care/Business Skills or equivalent in relevant subject, or substantial relevant experience
- **Knowledge:**
- An understanding of financial procedures and/or Public Sector financial systems.
- Overview of welfare benefits and relevant legislation.
- Good knowledge of administrative systems and ability to follow established procedures.
- Knowledge of the role of Adult Social Care and Local Government
- Knowledge of GDPR and handling sensitive and confidential information.
- **Experience:**
- Relevant, recent experience working in an administrative or financial office environment
- **Expertise:**
- Use of IT applications including databases, word processing, advanced spreadsheets.
- Prioritise and manage own workload whilst working to strict deadlines.
- Ability to analyse, develop and maintain accurate systems.
- Ability to handle, analyse and interpret complex, complicated information accurately and with attention to detail, in particular financial and legal information and documents.
- Ability to work to regulations, policies and procedures and be able to explain the rationale for decisions and actions taken.
- Excellent customer care and communication skills
- Support and contribute to projects
- Produce accurate and grammatically correct reports and letters.
- Ability to work as part of a team as well as independently, using initiative.

Disclosure and Barring Service (DBS) Checks

- This post requires a DBS check.
- The level of check required is
 - DBS Enhanced – Adults

Job Working Circumstances

Emotional Demands:

- Working with vulnerable / distressed/ angry / volatile / service users and/or families in their homes.
- Visiting, on occasion, clients with mental health issues and learning disabilities that can display challenging or spontaneous behaviours.

Physical Demands: Minimal

Working Conditions:

- Potential for physical and verbal abuse and/or threatening behaviour when visiting.

Other Factors:

- Due to the geographically diverse nature of the region and to effectively complete the duties of the role, driving with a valid UK driving licence and access to a vehicle to travel around the county to undertake visits is required.
- Awareness of personal health and safety and lone working procedures.