Financial Assessment Caseworker

Finance Assistant (G4)
Finance Technician (G5)

Job Brief

The Financial Assessment Caseworker role is responsible for helping determine how much a person should contribute towards the cost of their care and support. This involves gathering and verifying financial information, completing assessments, calculating contributions, and explaining outcomes clearly to service users, families and representatives. All work is completed in line with the Care Act 2014, statutory guidance and council policy

The role carries responsibility for managing a personal caseload, progressing cases from referral through to assessment and communication of outcomes. Post holders are expected to develop and maintain competency across both Residential and Non-Residential Financial Assessments, ensuring they can support the full range of work undertaken by the service.

Financial Assessment Caseworkers work closely with colleagues across Adult Social Care, Brokerage, Court of Protection and Appointee Services, and the wider Client Finance Service to ensure assessments are completed efficiently and accurately. A key part of the role is building positive and professional relationships with service users, families and representatives, helping people understand the assessment process, providing updates on progress, and supporting them through what can often be a complex and sensitive journey.

Expectations of the Role

Financial Assessment Caseworkers are expected to:

- Undertake both Residential and Non-Residential Financial Assessments.
- Manage a personal caseload and progress work within agreed timescales.
- Gather, verify and record financial and personal information accurately.
- Calculate client contributions in line with legislation, guidance and council policy.
- Build positive relationships with service users, families, representatives and professional partners.
- Communicate clearly, sensitively and professionally, helping people understand the assessment process and outcomes.
- Maintain accurate records and ensure decisions are clear, evidenced and auditable.
- Identify risks, discrepancies or safeguarding concerns and take appropriate action.
- Work collaboratively with colleagues to achieve positive outcomes for residents.
- Continually develop their knowledge of legislation, policy, guidance and best practice.

Progression Approach

The Financial Assessment Caseworker role is a career-graded opportunity, providing a structured pathway from Finance Assistant (G4) to Finance Technician (G5). The role supports the progressive development of knowledge, skills and experience across the full range of financial assessment work, including both Residential and Non-Residential assessments.

Through ongoing learning, practical experience and regular development discussions, individuals are supported to build their capability and progress through the pathway. Progression is based on the consistent demonstration of the skills, knowledge and behaviours required at the next level.

As experience develops, post holders will be expected to undertake a broader range of assessment activity with increasing independence, progressing from straightforward cases to more complex casework requiring greater professional judgement and application of legislation, policy and guidance.

Development is supported through regular one-to-one discussions between the post holder and their manager. Together, they will review progress, identify development opportunities and agree a development plan focused on building the skills, knowledge and experience needed for future progression.

The service uses an Ambition and Potential Framework to support professional development. The post holder is the primary driver of their career, proactively identifying development goals, seeking learning opportunities and building the experience needed for the next grade. Managers act as coaches, providing feedback, support and access to development opportunities to help individuals achieve their potential.

Summary

The Financial Assessment Caseworker role offers an opportunity to develop specialist knowledge and build a rewarding career within Client Finance. The role combines technical assessment work with strong customer service and partnership working, helping residents understand and navigate the financial assessment process.

Through a structured development pathway, regular coaching and a focus on continuous learning, post holders can progress their skills, broaden their experience and develop their career within the service.