

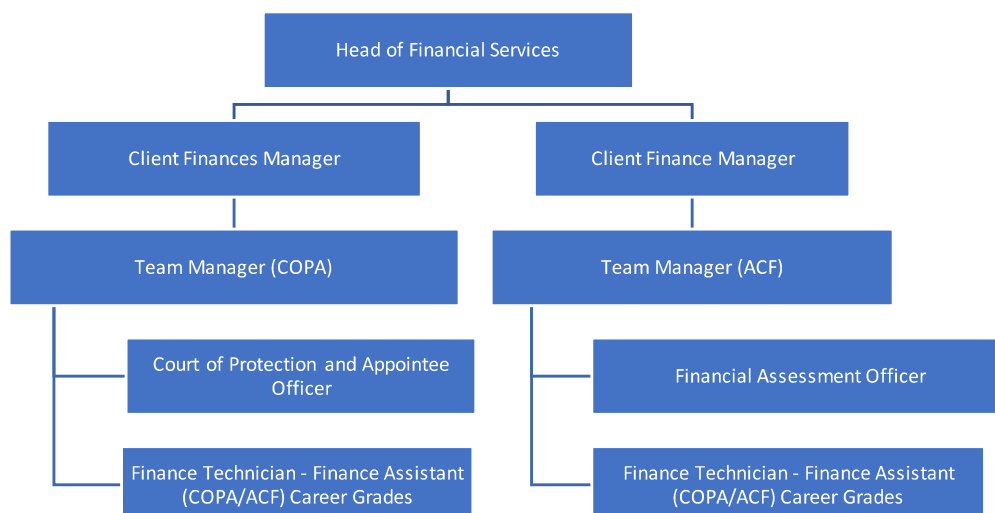
JOB DESCRIPTION & PERSON SPECIFICATION

Director Area: Resources	Job Ref Number: 03963
Service Area: Financial Services	Grade: G4
Job Title: Finance Assistant (COPA/ACF)	

PURPOSE OF JOB:

As a Finance Assistant, you will report to the Adult Care Financial Assessment or the Court of Protection and Appointee Officer and will be responsible for delivering timely and accurate financial services. The role will provide flexible and resilient support to team colleagues and our clients. You will understand the needs and expectations of our customers and ensure prompt delivery of services, taking action to resolve queries and/or issues promptly and courteously.

TEAM STRUCTURE:



MAIN DUTIES:

1	To work within the team providing financial support. This includes checking all the financial documentation is present underpinning the financial actions to be taken.
2	Maintaining financial records including all contributions charged, payments made and decisions taken.
3	To deal with incoming and ongoing correspondence within a timely manner, actioning incoming emails in a timely way and filing accordingly.
4	To deal with routine telephone enquiries of a personal and confidential nature pertaining to service users financial details.
5	Ensure advice provided is in accordance with the National and Local Standards, Policies and Procedures including but not limited to The Care Act 2014, Office of Public Guardian, Department of Work and Pensions, Councils Adult Social Care Charging Policy and the Councils Financial Procedures.
6	Investigate and resolve invoice discrepancies and processing issues and resolve in a timely manner. Share the learning with colleagues to create a continuous improvement approach.

7	To provide a high-quality customer service to both internal and external customers and always promote Equality and Diversity. Co-ordinate effective communication and good working relationships.
8	To operate and update client records accurately and within defined areas of responsibility, complying with all policies and within agreed timescales.
9	To deliver within LCCs Information Governance principles ensuring the safe and confidential capturing, handling, transfer and storage of client data.
10	To take personal responsibility for completing allocated areas of work as part of individual and team objectives and identify any improvements to operational processes, ensuring best use of resources.
11	Responsible for the completion of all mandatory training requirements of the role within stated timescales including but not limited to Information Governance and Safeguarding and ensure these are applied daily.
12	Remain up to date and compliant with all relevant legislation, organisational procedures, policies and professional code of conduct to uphold standards of best practice.
13	Adhering to the policies and procedures in place act on behalf of the client.
14	Assisting with the development of systems, processes operated to deliver the expectations of the role, continuously improving the service provided.
15	Work within a sound financial control environment including structured, efficient, and compliant financial systems.
16	Ensure compliance with Equality and Diversity policies of LCC in relation to financial activities.
17	Responsible for undertaking Continuing Professional Development, applying the learning to enhance service delivery. Create a continuous improvement approach to the role and feeding in the wider LCC business performance improvement programme.
18	Comply with Health and Safety policies and procedures.

PERSON SPECIFICATION

Requirements	Where identified*	Essential	Desirable
AAT Level 3, working towards AAT Level 4	A	X	
5x GCSE at Grade C / Level 6 or above including Maths and English	A	X	
Good numeracy skills, and able to work with accuracy.	A	X	
Complies with the values and behaviours of the council and displays a positive attitude when delivering their role.	I	X	
Good communication skills, ability to communicate effectively with senior officers in the council and external organisations applying both written and verbal skills	A/I/T	X	
Empathy and attention to detail are key skills for this role.	I	X	
Ability to respond quickly and positively to changing priorities	A/I	X	
Good ICT skills including Microsoft 365.	A/I/T	X	
Self-motivated person in a hybrid working environment	A/I	X	
Demonstrates problem solving capabilities.	A/I/T	X	

Demonstrates analytical skills with the ability to methodically breakdown financial problems	A/I	X	
Experience in dealing with members of the public, understanding of what good customer service looks like	A/I	X	
Good people skills maintaining composure in uncertain or challenging situations.	A/I	X	
Ability to manage own workload effectively and ability to prioritise actions arising from client contact.	A/I	X	
You will also be able to work constructively as part of a team understanding your role and responsibilities.	A/I	X	
Awareness and adherence of Financial Procedures, Policies and Legislation.	A/I	X	
Committed to personal development	A/I	X	
*A = Application form T = Test/Assessment I = Interview P = Presentation			

GENERAL

The postholder is required to take personal responsibility for contributing to organisational transformation and changes in ways of working, maximising the benefits and efficiencies for both internal and external customers, including the promotion and use of self-service to achieve maximum cost effectiveness.

The postholder is expected to work to the [Lincolnshire County Council Core Values and Behaviours](#) and to carry out the duties in accordance with Lincolnshire County Council policies.

Other Duties - The duties and responsibilities in this job description are not exhaustive. The post holder may be required to undertake other duties within the general scope of the post. Any such duties should not substantially change the general character of the post. Duties and responsibilities outside of the general scope of this grade of post will be with the consent of the post holder.

Safeguarding -. All employees need to be aware of the possible abuse of children and vulnerable adults and if you are concerned you need to follow the Lincolnshire County Council Safeguarding Policy. In addition employees working with children and vulnerable adults have a responsibility to safeguard and promote the welfare of children and vulnerable adults during the course of their work.