

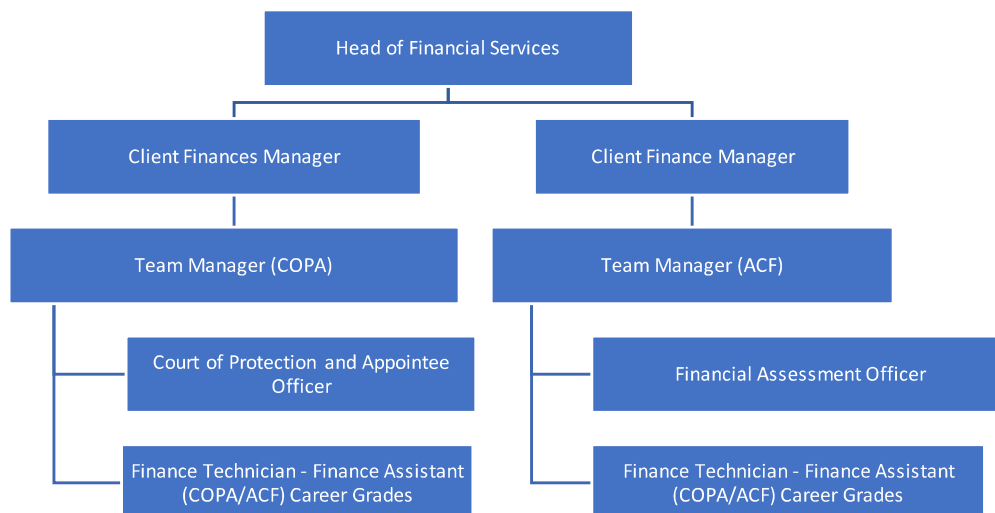
JOB DESCRIPTION & PERSON SPECIFICATION

Director Area: Resources	Job Ref Number: 03962
Service Area: Financial Services	Grade: G5
Job Title: Finance Technician (COPA/ACF)	

PURPOSE OF JOB:

As a Finance Technician, 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 assist with the financial administration of services carried out for people in receipt of Adult Social Care services.
2	To ensure that all entitlements to benefits and other income is correctly managed and claimed on behalf of the service user, seeking professional advice where appropriate
3	To assist with the reconciliation and updating of client accounts including the compilation of annual accounts or review of annual contributions; ensuring monies are promptly claimed and liabilities paid.
4	To deal with complex correspondence and telephone enquiries of a personal and confidential nature pertaining to service users financial details and the payments to service providers
5	To manage weekly diary activities, daily bank reconciliation, processing of invoices, personal allowances through online banking or issue of cheques as appropriate

6	Deliver good customer service, incorporating the Council's equality and diversity objectives and supporting the council to achieve best practice in all it delivers.
7	Look to continuously improve services in area of responsibility, identifying where possible efficiencies in process. Proactively manage the implementation of agreed service changes to own area of work
8	Recording and reconciling of financial calculations ensuring evidence provided by clients supports the client contribution calculated.
9	Provide customers and colleagues with the provision of accurate and effective financial information and intelligence including the implications of low-risk service development proposals and statutory changes.
10	Structure financial data relating to key income and expenditure drivers enabling problems to be solved.
11	Create a positive image of the County Council.
12	To deliver within LCCs Information Governance principles ensuring the safe and confidential capturing, handling, transfer and storage of client data.
13	To obtain information to enable FOI requests to be answered within the nationally set 20-day timescale.
14	Where vulnerable customers (as defined by the Policy) escalate potential financial distress for further action.
15	Assist with the Council's statutory obligations including assisting with the completion of statutory returns and where appropriate any national and local performance indicators
16	Keep up to date and compliant with all relevant legislation, organisational procedures, policies and professional codes of conduct to uphold standards of best practice
17	Work within a sound financial control environment including structured, efficient, and compliant financial systems.
18	Assisting with the development of systems, processes and reports to continuously improve advice, guidance and services provided.
19	Remain up to date and compliant with all relevant legislation, organisational procedures, policies and professional codes of conduct in order to uphold standards of best practice
20	To support the delivery of training and material for budget holders, Senior Managers, and for Financial Strategy, etc.
21	To undertake training in business-critical service areas to provide cover during peaks in service demand and periods of leave. This includes bank reconciliation cover.
22	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.
23	Ensure compliance with Equality and Diversity policies of LCC in relation to financial activities.
24	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.
25	Comply with Health and Safety policies and procedures.

PERSON SPECIFICATION			
Requirements	Where identified*	Essential	Desirable
Attained AAT Level 4 and working towards AAT Membership	A	x	
5x GCSE at Grade C / Level 6 or above including Maths and English	A	x	
Highly numerate, and able to work to a high level of accuracy.	A	x	
Complies with the values and behaviours of the council and displays a positive attitude when delivering their role.	I/P	X	
Awareness of the Council's constitution, financial regulations, financial procedures, scheme of authorisation and the Adult Care Charging Policy	I/P	X	
Empathy, attention to detail and accuracy are key skills for this role.	A/I	X	
Knowledge of the benefits system	A/I		X
Good people skills maintaining composure in uncertain or challenging situations.	A/I	X	
Knowledge of the Care Act 2014 and the Mental Capacity Act 2005	A/I		X
Good Communication skills – ability to communicate effectively with staff across the Council and build relationships with clients and their families, so as to secure their confidence and respect.	A/I/P	X	
Demonstrates ability to balance multiple responsibilities, prioritising based on urgency and service/customer relevance adapting quickly to the changing environment.	A/I/P	X	
Good presentation and report writing skills with the ability to be engage and explain complex information to a range of audiences.	A/I/P	X	
Good ICT skills covering Microsoft 365, Unit 4 BW and financial modelling tools..	A/I/P	X	
Able to establish strong relationships both internally and externally, building customers confidence in your advice and guidance	A/I	X	
Self-motivated person with the ability to motivate others in a hybrid working environment	A/I	X	
Good analytical skills with the ability to methodically breakdown financial problems.		X	
You will also be able to work constructively as part of a team understanding your role and responsibilities.	A/I/P	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.