

Financial Community Team Profile

Who is in Financial Community Team?

The Financial Community Team consists of a Team Manager, Financial Assessment Officers, Direct Payment Monitoring Officers, Direct Payment Advisors, Direct Payment Officer, Support Officer.

What does your team do?

In the Financial Community Team we:

- complete financial assessments for all residents within the community. This includes looking at the expenditure and income and calculating if/ how much their contribution towards their care will be.
- work with the Department of Work and Pension to include clients benefits in the financial assessment
- review how clients have been spending their direct payment on a quarterly basis
- monitor and gives advice on all aspects of direct payment funding
- provide training on understanding how direct payments work to internal staff
- run direct payment forums every quarter. At a direct payment forum you are able to support
- process the direct payments. Before processing a payment we need all the relevant paperwork and information on Mosaic needs to matches the care plan and add up
- send financial assessments forms to clients and are the first point of contact for clients or colleagues with any financial queries
- add clients details (that aren't already on Mosaic) onto Mosaic such as email addresses and national insurance numbers
- arrange visits to support the visiting officers help clients complete financial assessment forms.

Who do you work with regularly?

We work with nearly everyone within the Delivery Unit. We work with a range of Social Workers, Occupational Therapists and Assessments and Enablement Officers. We also work closely with the Income Team.

Other teams we work with are Learning Disabilities, Mental Health, Sensory Impairment, Transitions 0-25 and Hospitals.

Where do you fit into the customer journey?

The team can meet a client at any point of the journey. For example the Support Officer will be at the beginning of the customer journey by sending them a financial form to complete and answering any queries from colleagues or clients, whereas the Direct Payment Officer will be at the end of the customer journey because they process the agreed payment.

Anything else you would like your colleagues to know about your team?

On Mosaic before non-complex direct payment can reach the payment stage you must:

- Ensure client has been financially assessed to determine if client is eligible for Direct Payment.
- Obtain signed direct payment agreement and bank statement/letter and save in attachments section on Mosaic.
- Submit care plan to Brokerage who will allocate to inputting team to add the provision to Mosaic.

Every direct payment is individualised by each person care needs and is an important part of peoples journeys in helping them to be able to live a more independent life. If you would like training on understanding direct payments in further detail speak to Sue Friar.

Someone has worked in our team for 16 years!

Before we send out letters to the clients of their financial contribution the providers and services need to be inputted on Mosaic.