**JOB DESCRIPTION**

Role: **Income Maximisation Officer**

Location: **Inverness Badenoch and Strathspey Citizens Advice Bureau (Union Street office)**

Responsible to: Deputy Manager

Grade: IBS5 Point 17-22 £20,529-£23,537

**Advice work:**

* To provide advice and casework on the full range of enquiry areas relating to income maximisation, particularly welfare benefits and maintaining Citizens Advice quality standards. This will predominantly involve completion of benefit claim forms once all criteria are fully explored and confirmed with the client. Once applications are lodged and outcomes closely monitored, to be involved with ongoing casework support/assistance with mandatory reconsideration progression, requesting medical/supportive evidence for these and the lodgement of appeals where deemed appropriate.
* To be committed to the aims, principles and policies of the Citizens Advice service in every aspect of service delivery.
* To be able to support clients with a clear plan of action to enable them to take action for themselves and to advocate for those who need practical assistance to progress their case.
* To produce detailed case records on our CRM System CASTLE for the purpose of continuity of casework, statistical monitoring and report preparation

**Social policy and campaigning:**

* Identify research and campaign issues and actively participate in gathering evidence of social policy issues including case studies.

**Case management and administration:**

* Manage own caseload and be able to work independently or with minimal supervision
* Ensure that all work conforms to the organisation’s systems and procedures.
* Use of CRM (CASTLE) as well as Microsoft Office (e.g. Word, Outlook and Excel) for communication and document production.
* Provide case studies and statistical information as requested for reporting purposes

**Data handling and Confidentiality:**

* Ensure data protection regulations are adhered to and that sensitive data is handled in accordance with relevant legislation and organisational procedures.
* Abide by Citizens Advice confidentiality policy and office procedures

**Working with others:**

* Develop and maintain good working relationships with the team, sharing information and making a positive contribution by working proactively toward organisational goals.
* Develop and maintain good working relationships with external stakeholders, including statutory and voluntary service providers

**Professional development:**

* Keep informed of new and changing legislation relevant to the post, and of local issues and policies
* Be able to identify own training needs, taking responsibility for own development
* Attend regular training to develop knowledge, skills and expertise
* Attend and contribute to support and supervision and appraisal meetings with the line manager, to further own development.

**Other Duties and Responsibilities:**

* Promote the work of the Bureau both locally and nationally, as required
* Attend relevant internal and external meetings, as and when required
* Flexible approach to service delivery, including working outside of normal office hours on occasion, as required, and willingness to work at any of our premises or outreach locations
* Willingness to carry out any other related tasks, as required by your line manager, which are compatible with the functions of the post.

**PERSON SPECIFICATION**

When we shortlist and interview for this post, the Person Specification will be used to assess each applicant in terms of their ability to do the job as set out in the job description.

When completing the application form you should try to show how your skills, qualities and experience match each of the criteria below. As well as work experience, you can draw on personal and voluntary work experience.

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| **PERSON SPECIFICATION CRITERIA** | E (essential) D (desirable) |
| 1. Proven experience (full or part-time equivalent) of providing good quality advice on a range of subjects, particularly welfare benefits. Experience of using Benefit Calculation Programmes as well as the ability to calculate from using books and charts. | E |
| 2. A clear understanding of, and commitment to, Citizens Advice service’s aims and principles and Equality & Diversity policies  | E |
| 3. Good interpersonal skills and the ability to relate to a wide cross section of people both face-to-face and on the telephone, respecting views, values and cultures that may be different from your own | E |
| 4. Effective verbal and written communication skills, including the ability to analyse and interpret complex information, helping the client to evaluate options | E |
| 5. Ability to assist clients by supporting them to take action themselves or acting on their behalf  | E |
| 6. Adequate knowledge of IT to maintain databases, case records and write reports | E |
| 7. Numeracy skills to the level required to undertake accurate welfare benefit calculations, produce financial statements and check benefits awards | E |
| 8. Ability to manage stressful and difficult situations whilst maintaining a professional approach  | E |
| 9. Ability to work under pressure, to plan and organise own work and meet deadlines, while maintaining standards  | E |
| 10. Ability to work on own initiative, independently and with minimal supervision | E |
| 11. Proactive and cooperative with team members to promote a good work environment | E |
| 12. Committed to keeping knowledge up to date and undertake training, in order to maintain quality standards | E |
| 13. Willingness to work remotely and flexibly from any of our offices and outreach locations, and occasionally outside office hours, prioritising service needs  | E |