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# POST – Multi Channel CAB Adviser – Help to Claim & Money Talks Team

The Citizens Advice network is set to deliver a comprehensive, enhanced support service encompassing the Finance Health Check and Help 2 Claim Projects.

This will be delivered through the channels of telephone and web chat interaction with clients.

The overarching aim of this Project is that from April 2019 we will provide the advice and support people needed in order that:

* Clients are able to submit their claim for Universal Credit and if necessary we can support them through to their first payment. *(Help 2 Claim)*
* Additionally through advice and information we will be supporting clients to check that they are receiving all benefits they are entitled to and to support clients to initiate claims thereby improving their financial outcomes. (Financial Health Checks)

# About the job

We are looking for a client-focused individual with experience of providing welfare benefits advice and income maximisation benefit checks, to join us as a Telephone/Web Chat Adviser covering Finance Health Checks and Help 2 Claim Advice Channels. In this role you will be using telephony and webchat to help ensure our clients get the advice, information and support they need.

To succeed, you will need relevant experience and knowledge of the wider welfare benefit system including Universal Credit, demonstrating strong oral and written communication skills. You will be experienced on using benefit entitlement calculators and in explaining the results of the benefit check. We are also looking for a proven ability to work effectively and well organised. Proficiency using a range of IT tools to carry out your work, including case management systems, online claims’ services and Microsoft Office applications is essential. Committed, results-driven and supportive to the needs of others, you work well within a team and are willing to follow and develop agreed procedures.

As an Adviser you will deliver a holistic advice and support service aimed at clients on completing their initial Universal Credit claim, and to support them through to their first payment. This will involve helping with the online forms, the evidence required, and verifying their identity online using telephone and web chat.

# How to apply

For further details and information on how to apply, please contact [admin@invernesscab.casonline.org.uk](mailto:admin@invernesscab.casonline.org.uk) Please note that the post is subject to the disclosure of criminal history information.

# Job Description

* **Position:** Multi Channel CAB Adviser – Help to Claim & Money Talks Team
* **Responsible to:** Project Line Manager

**Key responsibilities**

* To conduct telephone and web chat interviews, using sensitive listening and questioning skills to allow clients to explain their problem(s) and empower them to set their own priorities
* To explore clients’ circumstances, options, support needs and access channel preferences considering language barriers, accessibility needs, and issues around digital access and ability
* To assist with the setup of a Universal Credit account, including setting up a personal email account and/or bank account, if needed
* To carry out Benefit Checks explaining in detail to clients the next stages to claim benefits or appeal decisions – if required to assist clients in making applications or advising clients where to go for further assistance.
* To provide support to clients completing and submitting their claim form, ensuring clients have identified and gathered all evidence and documentation needed
* To support the client through the first assessment period and helping them to complete the identity verification process online, if needed
* To support clients to prepare for their first appointment with a Jobcentre Plus work coach
* If appropriate, to support the client with applying for any additional support such as short-term advance and/or access to the Scottish Welfare Fund
* To ensure the client understands the payment schedule and takes action to prepare
* To liaise where appropriate with bureau staff and other relevant agencies as appropriate
* To record, update and maintain information on a case management system for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation
* To ensure that all work meets quality standards and the requirements of the funder
* To provide and develop a quality advice service in relation to Universal Credit, including the ability to act as a ‘best practice lead’ for other staff and volunteers
* To arrange face-to-face appointments with Bureaux elsewhere in Scotland to assist the client if required.
* To keep abreast of the latest developments relating to welfare benefits and Universal Credit
* Attending team and staff meetings as required
* Carrying out other duties as specified by the Manager relating to Welfare Benefits advice within the Bureau.

The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonably requested by the bureau manager.

# Person Specification

**Knowledge, skills and experience**

**Essential**

* A sound recent working knowledge of social security benefits and entitlement, including Universal Credit and Benefit Check Calculators including the ability to interpret results.
* Experience of working with people with multiple and complex needs
* Ability to work without supervision and be able to prioritise workload
* Experience of using a range of IT tools to carry out your work, including case management systems, Microsoft Office applications, online applications, internet and email etc.
* Excellent oral and written communication skills, including the ability to communicate complex information in a clear and accessible manner
* Excellent organisational skills
* A commitment to the aims, principles and policies of Citizens Advice Bureau
* Ability to operate as a team player and communicate effectively with colleagues and managers
* Ability to use telephony and IT systems to deliver services across multiple channels ( web chat and telephony)
* Completion of Citizens Advice Bureaux Adviser Training Programme
* Basic knowledge of multiple enquiry areas to aid with identifying emergencies and making referrals where appropriate

**Additional requirements**

* The post is subject to the receipt of a satisfactory Basic Disclosure Certificate
* The post is subject to the disclosure of criminal history information