**FINANCIAL HEALTH CHECK HELPLINE ADVISER: JOB DESCRIPTION**

Job Title: Financial Health Check Helpline Adviser

Hours: 17.5 hours per week

Type of contract: Fixed term until September 2019 with possible extension (depending on funding)

Salary: 18,200 (pro rata per annum – actual £9,100)

Closing Date: 29 May 2019

**Summary of role**

The Financial Health Check Helpline Adviser will play a key role in the delivery of an innovative multi-channel Financial Health Check service within the CAB network in Scotland. This project aims to improve access to and the efficiency of Financial Health Checks for vulnerable families and older people. The Financial Health Check Helpline Advisers are the first point of contact for clients who access the service through a dedicated telephone helpline.

**Main responsibilities**

The project delivers an income maximisation service tailored to suit the needs of the client. The helpline adviser will gather information and provide a holistic diagnosis of the client’s needs, helping to support the client to maximise their income and identify whether they are able to self-help. If appropriate, the helpline adviser will then refer on to a specialist adviser or to the client’s local CAB for a face-to-face appointment or to another appropriate agency. On-site support and training will be provided by the Citizens Advice Bureau.

**General Responsibilities**

Undertaking diagnostic interviews with clients by telephone and diagnosing whether individuals are eligible to apply for benefits or to access other income maximisation support.

* Help with resolution of straightforward enquiries
* Signposting clients who can do more to self-help
* Referring to specialist adviser for help with complex enquiries
* Referring to the client’s local CAB for face-to-face support with more complex issues
* Working with the CAB manager and specialist adviser to ensure efficient service provision
* Maintaining case records including detailed statistics
* Maintaining up to date knowledge in relevant legislation e.g. welfare rights
* Providing information for project reports
* Attending team and staff meetings as required
* Carrying out other duties as specified by the Manager and required by the needs of the post

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| FINANCIAL HEALTH CHECK HELPLINE ADVISER  PERSON SPECIFICATION | | | | |
| PERSON SPECIFICATION | ESSENTIAL | | DESIRABLE |
| Qualifications | Good general level of education | | Completed Citizens Advice Scotland Adviser Training Programme, or willingness to complete  Evidence of vocational training/ qualifications |
| Skills and Experience | Experience of assisting people with a wide range of vulnerabilities  Excellent oral and written communication  Strong client focus  Good planning and organisational skills  Commitment to quality and continuous improvement  Ability to work on own initiative  Experience of using a range of IT tools including case management systems and Microsoft Office applications.  Maintaining strictest level of confidentiality on service delivery | |  |
| Knowledge and Attributes | Up to date knowledge of Welfare Rights  Commitment to the support and empowerment of individuals and Citizens Advice Bureaux aims and principles  Awareness of the social needs of local communities  Commitment to team working  Commitment to equality of opportunity | | Experience of establishing effective partnerships with other agencies |
| Values and Attitudes | Empathy and good listening skills  Ability to identify and respond to the communication needs of clients  Ability to work without close supervision and prioritise own work | | Ability to work within a community development or volunteer setting |
|  | |  | | |
|  | |  | | |
|  | |  | | |
|  | |  | | |