

North Ayrshire Citizens Advice Service

Job Description

This job description describes the practical purpose and main elements of the job. It is a guide to the nature and main duties of the job as they exist currently, but is not intended as a wholly comprehensive or permanent schedule.

1. JOB DETAILS

Job Title: HMRC Specialist Adviser

Reports to: CEO

Reporting to job-holder: N/A

Location: Saltcoats

Salary: £25,000 p.a.

2. OVERALL PURPOSE OF THE JOB – To successfully deliver the HMRC advice project and provide support to the bureau operations

3. PRINCIPAL ACCOUNTABILITIES – *This describes the key areas of the job.*

Main duties

- Successfully deliver advice and assistance to HMRC customers on matters of PAYE, claims for Special Relief and Appeals, Tax returns and other complex HMRC enquiries, Working Tax Credits, Child Tax Credits and Child Benefit and any other relevant benefits
- Deliver project awareness to all partner agencies and workplaces and agree robust referral procedures
- Establish referral procedures with HMRC for incoming and outgoing enquiries
- Provide one to one support for HMRC customers experiencing difficulties in accessing HMRC services through digital exclusion
- Provide support for clients who lack confidence or who are new to HMRC services
- Provide specialist advice support to the bureau operations
- Possible SSAT tribunal representation and preparation of cases.
- To complete accurate records for all clients seen and ensure all related paperwork and correspondence is filed appropriately in compliance with NACAS confidentiality

procedures

- To ensure all clients complete survey forms and store them as agreed with HMRC
- Provide monthly project reports to Chief Executive
- To complete standard and bespoke letters and other correspondence and make telephone calls as necessary to progress cases
- To ensure all casework is completed to a high standard in accordance with NACAS procedures and submitted timeously.
- To attend all meetings as directed by the Chief Executive or delegated Manager.
- To ensure any Social Policy issues are recorded and reported to CAS as per NACAS procedures.
- To undertake any other tasks as directed by the CEO, or delegated Manager.

These key tasks are not intended to be exhaustive, but they highlight a number of major tasks that the post-holder may be reasonably expected to undertake.

Person Specification

4. QUALIFICATIONS – ESSENTIAL/DESIRABLE

Essential
1. Degree (or obtained this level through prior working experience.)
2. Completion of specialist advice training.
Desirable
3. Specialist relevant qualifications.
4. Trained in advice giving

5. EXPERIENCE - ESSENTIAL/DESIRABLE

Essential
1. Knowledge of complex HMRC matters
2. Extensive knowledge of Benefits in particular; Working Tax Credits, Child Tax Credits and Child Benefit
3. Ability to co-ordinate, extract and analyse data efficiently and accurately
4. Have a high degree of attention to detail
5. Willingness to undertake appropriate further training as required

6. Ability to organise and prioritise workload and deliver to deadline
7. Ability to work as part of a team
Desirable
9. Knowledge of, or experience in preparing tax returns and claims for Special Relief and other ad hoc tax queries
10. Knowledge of HMRC systems
11. Project Management experience
12. Experience of Tribunal Representation
13. Experience of Statistical Report Writing
14. Trained in advice giving

6. PERSONAL CHARACTERISTICS - ESSENTIAL

Essential
1. Proficient user of Microsoft packages (Word, Excel, Access and Outlook)
2. Ability to work without supervision.
3. Excellent written and oral communication skills (particularly on the telephone and with all first line contact).
4. Attention to detail; good record keeper.
5. Positive and flexible approach.
6. Demonstrable commitment to equal opportunities.
7. Excellent planner and organiser.

7. PERSONAL COMPETENCIES – as per agreed NACAS Competencies

Essential
1. Effective Communications
2. Personal Effectiveness
3. Strive for continuous improvement
4. Relationship Building

8. ADDITIONAL COMMENT – *Information which is significant but not covered elsewhere in this description.*

This role may involve travelling to and attendance at meetings throughout the region. The job holder will therefore be required to be flexible in approach and to travel as required.

Note:

Every job description in the Organisation will be subject to a review either:

- on an annual basis at the time of the annual appraisal meeting, or
- as a result of a change in strategic direction, or
- as a result of a team / operational requirements, or
- as a result of agreed performance appraisal needs and objectives, or
- within six months of appointment