



DAGCAS SCQF Level 6	Financial Health Check Adviser
Reporting To	Financial Health Check Coordinator
Job Function /Location	
Purpose of Job	<ul style="list-style-type: none"> The financial health check adviser will play a key role in the delivery of an innovative multi-channel financial health check service in 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 workers are the first point of contact with clients who access the service through a dedicated helpline by phone
Competencies	
Scope of Work	<ul style="list-style-type: none"> As detailed in Degree of Autonomy
Degree of Autonomy	<ul style="list-style-type: none"> Undertake diagnostic interviews with clients by phone or via webchat to check whether individuals are eligible to apply for benefits or to access other income maximisation support. Help with resolution of straightforward enquiries Signpost clients who can do more to self-help Refer to manager for help with emergencies Refer to local CAB for face-to-face support with more complex issues Work with the CAB administrator to ensure efficient service provision Develop and maintain expertise in relevant legislation e.g. welfare rights and benefits Carry out other duties as specified by the Manager and required by the needs of the post
Processes	<ul style="list-style-type: none"> To maintain accurate statistics for monitoring purposes. To adhere to company principles and uniform standards in case recording. Provide information for project reports.
Quality	<ul style="list-style-type: none"> Ensure records are maintained which demonstrate compliance with training and competence requirements Adhere to DAGCAS' recognised good practice and standard processes and procedures to ensure governance and compliance at all times. Contribute to overall efficiency and quality of processes and procedures.
Skills	<ul style="list-style-type: none"> IT Literate. Excellent written, oral and communication skills. Organisational/planning skills. Person specification requirements are detailed in person

	specification document.
Knowledge	<ul style="list-style-type: none"> • Understand aims and principles of policies and procedures and contribute to development and revision of these policies and procedures. • Identify and progress matters of social policy relevant to the remit and within current guidelines and processes. • Have and maintain expertise in relevant legislation, case law, codes of practice related to this field of work.
Personal Development	<ul style="list-style-type: none"> • Identification of personal strengths and weakness, as well as identifying personal training needs. • Attend in-house and external training courses as appropriate • Attend team and staff meetings as required

Person Specification

Job Title:	Financial Health Check Adviser
Knowledge & Understanding	<ul style="list-style-type: none"> • Combination of education and experience to SCQF Level 6 • Evidence of continuous professional development. • Relevant qualification would be desirable. • Must possess and maintain expertise in relevant legislation. • Minimum 2 years recent experience working within an advice environment would be desirable.
Communication, numeracy and ICT skills	<ul style="list-style-type: none"> • Ability to communicate effectively with people in writing and verbally, including by telephone. • Good interpersonal skills in a customer-facing role. • Able to empathise with clients while ensuring required action is advised, including directing clients to other sources of advice and support. • Commitment to team working approach. • High level of numeracy and literacy, with an ability to capture and collate statistical information for analysis. • Demonstrate a competent knowledge of Microsoft Office applications and an ability to learn and use a range of other software on a daily basis.
Generic cognitive skills, such as evaluation or analysis	<ul style="list-style-type: none"> • Ability to identify and resolve problems quickly and efficiently • Good time management skills. • Good interview and diagnostic skills.
Autonomy & Accountability	<ul style="list-style-type: none"> • Ability to work on own initiative, prioritise work and handle pressure. • Dependable, reliable, trustworthy and approachable. • Able to work to agreed quality standards. • Able to work flexible hours as required by the service and the needs of clients. • Possess an organised approach to all areas of work, including recording and filing of work, while being cognisant of the need for discretion and security of information.
Practice: applied knowledge, skills and understanding	<ul style="list-style-type: none"> • Flexible approach to tasks and a positive attitude. • Able to work within required statutory standards. • Support the principal of volunteerism. • Clear understanding of the importance of excellence in service delivery. • Willingness to learn and develop new skills. • Awareness of current policy issues within their field, relating to individuals in Scotland. • Understanding of the issues that affect clients and how it affects individuals and their families. • Working knowledge of existing legislation. • Have an understanding of social policy related work and how to apply this in a work environment. • Knowledge of Health and Safety legislation.
Values and attitudes	<ul style="list-style-type: none"> • An understanding and commitment to the aims and principles of the CAB service and to the policies and procedures of the Bureau.