**WEST DUNBARTONSHIRE CITIZENS ADVICE BUREAU**

**TRIAGE ASSESSOR (CLYDEBANK OFFICE)**

**Job Description & Person Specification**

**Key work areas and tasks as the Triage Assessor:**

* Provide a triage assessment of client needs when accessing the drop-in service by identifying key information about the issue(s) and whether there are any related problems
* Establish what the client wants and identify time limits, key dates and any requirement for urgent advice or action
* Assess whether the client may be vulnerable and need help quickly
* Determine whether the problem is one which the CAB can help with or whether the client needs information about other sources of help
* Assess and agree the appropriate level of service, taking into consideration the client’s ability to take the next step themselves, the complexity of the issue(s) and the Bureau’s resources.
* Refer clients appropriately (both internally and externally) to suit clients’ needs following agreed protocols, including making arrangements and informing clients of what to expect.
* Signpost clients appropriately to suit their needs, following agreed protocols.
* Record information given during the triage service in the Bureau’s case management system (CASTLE).

**Professional development**

* Keep up to date with legislation, policies and procedures and undertake appropriate training.
* Attend relevant internal and external meetings as agreed with the line manager.
* Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate

**Administration**

* Use IT for statistical recording, record keeping and document production.
* Ensure that all work conforms to the Bureau's systems and procedures.
* Provide statistical information on the number of clients and nature of cases.

**Other duties and responsibilities**

* Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service.
* Demonstrate commitment to the aims and policies of the CAB service.
* Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.

**Person specification**

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|  | **ESSENTIAL** | **DESIRABLE** |
| **Experience** | * A minimum of at least 2 years’ experience in advising in the CAB service. * Experience providing an advice triage assessment to clients accessing drop in clinics within a very tight schedule. * A working knowledge of the procedures of the Citizens Advice Bureau service | * Experience in core CAB advice subjects Experience providing an advice triage assessment to clients accessing drop in clinics within a very tight schedule. |
| **Skills and attributes** | * Ability to communicate and establish good relationships with a range of people * Ability to work without close supervision, prioritise own work and meet deadlines * Ability to deal with difficult situations in a calm, effective non-confrontational manner * Ability to communicate effectively, both orally and in writing * Ability to gather and accurately record statistics * Excellent organisational skills * Ability to work under pressure | * Ability to work as part of a team and on own initiative * Ability to produce statistical and written reports |
| **Knowledge** | * An understanding of case recording systems and procedures * An understanding of the needs of the funders relating to clients, client profiles, recording of cases and financial gain. | * Knowledge of local voluntary organisations |
| **Values and attitudes** | * An understanding and commitment to the aims and principles of the CAB service and to the policies and procedures of the Bureau. | * Understanding of the needs of people who may be vulnerable, distressed or under stress * An understanding of the need for partnership working and a proactive approach to same. |
| **Other** | * A willingness to identify and undertake relevant training * Ability to work flexibly and to travel to a variety of locations within the area |  |