

NORTH TYNESIDE CITIZENS ADVICE Job Description

Trainee Money Advice Caseworkers & Experience Money Advice Caseworkers to work within our Social Welfare Advice Team (SWAT)

Responsible to: Operations Manager

Accredited Caseworker: £29,271.93 per annum.

Trainee Salary: £26,430.07 per annum

Hours: 37 per week

To provide a high-quality advice service to clients – by a multi-channel delivery (Telephone, webchat, email & face to face).

The SWAT Trainee caseworker is a developmental role, and the post holder will be required to complete the relevant accredited debt advice training during your probation period of 6 months.

Key Areas of Responsibility

1. To provide a high-quality debt, benefits and housing advice service to our clients over the telephone (full training will be provided)
2. To maintain a high standard of case recording.
3. Maintain standards of service delivery and ensure that all advice work meets the appropriate standard required by the Money Advice & Pension Service, Citizens Advice Quality of Advice Audit, and the Financial Conduct Authority (FCA)
4. To be responsible for achieving the Key Performance Indicators (KPI's) set for this post.
5. Carry our casework for clients when necessary, including, advocating on behalf of clients recording accurate casenotes on our internal case management system, negotiating with third parties, drafting letters to clients and third parties, completing budgets & financial statements.
6. Assist clients with budgeting and income maximisation including advice on entitlement to welfare benefits using Quick Benefit Check.
7. Assist clients with other related problems where they are an integral part of the case and refer to other advisers or specialist agencies as appropriate.
8. Proactively manage a varied workload, ensuring deadline are met, including taking ownership for monitoring own workload e.g., proactively reviewing progress on current cases and recording outcomes of completed cases.

9. Read relevant publications and electronic updates to maintain own knowledge keep up to date with legislation, case law, policies and procedures relating to Social Welfare Advice (Debt, Benefits and Housing).
10. Work flexibly within a team environment, respond positively to change and attend staff/team meeting as appropriate.
11. To work within the Aims, Principles and Policies of the Citizens Advice service.
12. To contribute to the Social Policy, work of the Citizens Advice North Tyneside and our National organisation.
13. To carry out the relevant administrative tasks necessary to progress your cases.

Other Duties and Responsibilities

The Trainee SWAT caseworker will be required to assist in the following duties:

1. Interview clients over the telephone to explore their situation and complete an initial Debt Assessment using software system.
2. Take inbound calls from clients who contact our national Debt helpline.
3. Signpost clients to other providers as appropriate.
4. Make and take calls from professional agencies as required to establish circumstances.
5. Deal with incoming emails from clients and creditors.
6. Manage workflow via task list.
7. Identifying opportunities for the Service's development and undertaking forward planning so the Service can respond to local needs.
8. To abide by health and Safety guidelines and share the responsibility for their own safety and that of colleagues.
9. Any other reasonable administrative duties required ensuring the smooth running of Citizens Advice North Tyneside.

Performance Standards

Performance standards will be continually assessed by the Money Advice Manager. You are responsible for meeting the performance standards set for this role. Any under performance will be addressed and if appropriate, remedial support will be provided. If the required standard is still not achieved and failure to deliver continues, disciplinary action will be taken.

Working conditions

1. The post-holder will report directly to the Money Advice Manager
2. Operate within an Equal Opportunities Policy.

Training

This post will offer comprehensive training. You will be required to commit to and complete the Money and Pension Service Accreditation training required for the post during your probation period.

PERSON SPECIFICATION

Trainee Social Welfare Adviser & Social Welfare Adviser

ESSENTIAL

1. To undertake and successfully complete the Citizen's Advice Adviser Learning Programme and complete the MaPs debt accreditation programme.
2. Proven customer service skills over the telephone.
3. An ability to meet deadlines in a fast-paced environment, meet performance targets and take responsibility for their work.
4. Ability to work proactively on their own initiative and be proactive in identifying and resolving problems and tasks.
5. A flexible 'can do' disposition, able to adjust to an environment of constant change.
6. An ability to work cooperatively to achieve team targets.
7. A commitment to the Aims and Principles of the Citizens Advice.
8. Knowledge and experience of IT systems, software, and processes, particularly within an advice setting.
9. Exhibit excellent listening and questioning skills.
10. An ability to analyse and interpret complex information and the ability to explain it to clients effectively both verbally and in writing.
11. A good, up to date understanding of equality and diversity and its application to the provision of advice

DESIRABLE

12. At least one years' experience in advice work or a customer service centre.
13. Experience of delivery advice via webchat.
14. The ability to identify Social Policy issues arising from advice work and an ability to analyse and report on those issues.