



- > **Job Title:** Help to Claim Adviser (Universal Credit)
- > **Responsible to (line management):** Bureau Manager
- > **Responsible to (operations management):** Operations Officer

## About the role

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A Help to Claim Adviser (Universal Credit, further 'adviser') delivers a holistic advice and support service aimed at clients on completing their initial Universal Credit claim and supports them through to their first payment. This involves helping with the online forms, the evidence required, and verifying their identity online using telephone, web chat and video call.

The adviser will be expected to complete full holistic issue diagnostics, support with issues in scope of the project and any emergencies, then refer on to further services available to the client. The adviser should maintain local connections with partner organisations and the DWP within their region.

The adviser will be line managed by their local bureau manager but will be operationally responsible to the Citizens Advice Scotland Operations Officer for providing their regional service and local knowledge. They will be required to liaise with the Operations Officer regarding their shifts, helpline coverage and holiday requirements.

## Job description

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### Key responsibilities

- > To conduct telephone, web chat and video call interviews, using sensitive listening and questioning skills to allow clients to explain their problem(s) and empower them to set their own priorities
- > To explore clients' circumstances, support needs and access channel preferences considering language barriers, accessibility needs, and issues around digital access and ability
- > To assist with the setup of a Universal Credit account, including setting up a personal email account and/or bank account, if needed
- > To provide support to clients completing and submitting their claim form, ensuring clients have identified and gathered all evidence and documentation needed
- > To support the client through the first assessment period and helping them to complete the identity verification process online, if needed
- > To support clients to prepare for their first appointment with a Jobcentre Plus work coach
- > If appropriate, to support the client with applying for any additional support such as short-term advance and/or access to the Scottish Welfare Fund

- To ensure the client understands the payment schedule and takes action to prepare
- To liaise where appropriate with bureau staff and other relevant agencies as appropriate
- To record, update and maintain information on a case management system for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation
- To ensure that all work meets quality standards and the requirements of the funder
- To provide and develop a quality advice service in relation to Universal Credit, including the ability to act as a 'best practice lead' for other staff and volunteers
- To keep abreast of the latest developments relating to welfare benefits and Universal Credit
- To ensure local knowledge and connections with regional partner organisations, such as Job Centres and food banks are well maintained to ensure local referral routes for further client support beyond the scope of the project are available

The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonable requested by the bureau manager.

## Person specification

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### Knowledge, skills and experience

#### Essential

- Demonstrable completion of Citizens Advice Bureau Adviser Training Programme
- A sound working knowledge and experience with social security benefits and entitlement, with specific focus on Universal Credit
- Understanding, maintaining and practising high standard of case recording requirements as according to the FSO project specification and the CAS quality assurance standards
- Ability to use telephony and IT systems to deliver services across multiple channels (web chat, telephony and video) via Avaya, Near Me, Zoom, Teams and other systems
- Experience of using a range of IT tools to carry out work, including case management systems, Microsoft Office, internet and email etc.
- Ability to work without supervision and prioritize workload
- Experience of working with people with multiple and complex needs
- Excellent oral and written communication skills, including the ability to communicate complex information in a clear and accessible manner
- Excellent organisational skills

- > Knowledge of a range of enquiry areas to aid with identifying emergencies
- > A commitment to the aims and principles of Citizens Advice Service
- > Ability to operate as a team player and communicate effectively with colleagues and managers
- > Regional experience engaging with, building and maintaining relationships with local and regional stakeholders (such as Job Centres, Food Banks, drug and alcohol support organisations, etc.)

### **Additional requirements**

- > Ability to commit to a rolling rota to be assigned for times between 07:45 and 19:00
- > Must be available to work a varied shift pattern between 07:45 – 19:00 Monday – Friday plus during specified holidays, including the Christmas and Easter periods
- > The post is subject to the receipt of a satisfactory Basic Disclosure Certificate
- > The post is subject to the disclosure of criminal history information

### **Desirable**

- > A proven ability to work effectively with a wide variety of stakeholders
- > Experience working on helpline, webchat and video conferencing (Near Me)
- > Potential ability to work remotely and as a part of a virtual helpline team

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**Charity number: SCO17611**

**Charity name: Clydesdale Citizens Advice Bureau.**