**Help to Claim Assessor**

Thanks for your interest in working at Citizens Advice Hart. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you’ll find:

* Our values
* 3 things you should know about us
* Overview of Citizens Advice and Citizens Advice Hart
* The role profile and personal specification
* Terms and conditions
* What we give our staff

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| **Want to chat about this role?**  If you want to chat about the role further, you can contact Sam Mabbott by emailing first on chiefofficer@hartcab.cabnet.org.uk or calling 07771 848697, please leave a message and you will be called back |

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| **Our values**  **We’re inventive.** We’re not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren’t working.  **We’re generous.** We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone**.**  **We’re responsible.** We do what we say we’ll do and keep our promises. We remember that we work for a charity and use our resources effectively. |
| |  |  | | --- | --- | |  | **3 things you should know about us** |   **1. We’re local and we’re national**. We have 6 national offices and offer direct support to people in around 300 independent local Citizens Advice services across England and Wales.  **2. We’re here for everyone.** Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won’t turn people away.    **3. We’re listened to - and we make a difference.** Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us. |

**How Citizens Advice Hart works**

Citizens Advice Hart is a charity and part of the national [Citizens Advice network](https://www.citizensadvice.org.uk/about-us/introduction-to-the-citizens-advice-service/), made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

Citizens Advice Hart provides a free, independent, impartial, and confidential advice service to over 3,300 people each year. We help our clients find a way forward with a range of problems including accessing welfare benefits, managing debt, resolving employment, consumer, family relationships, and housing issues. We operate from offices in Fleet and Yateley (North East Hampshire) and at outreach locations across Hart District local authority.

Our service is currently delivered by around 40 volunteers and a number of part-time staff. Our advice-facing roles operate across different channels such as face-to-face appointments, webchat, email, telephone, and video calls to ensure we are accessible to our clients.

We run a number of projects including a service to support armed forces families, for those affected by cancer, to help those facing debt and at risk of eviction, those facing difficulty with fuel debt, and those applying for Universal Credit through the Help to Claim program. We are ambitious to develop new services to support the more vulnerable members of our district.

 **Overview of Citizens Advice**

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| The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.  This role sits in our network of independent charities, delivering services from   * over 600 local Citizens Advice outlets * over 1,800 community centres, GPs’ surgeries and prisons   They do this with:   * 6,500 local staff * over 23,000 trained volunteers   Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30-minute drive of where they live. |  |

 **The role**

Citizens Advice is delivering a new service called “Universal Support: Help to Claim” which offers end-to-end support to help people make a new Universal Credit claim and be ready for when their first payment arrives.

We are looking for an adviser with good IT skills to support clients to make and complete their new Universal Credit claim, as well as a commitment to the aims and principles of the Citizens Advice Service.

You’ll have the ability to interview clients using sensitive listening and questioning skills to get to the root of the issues and empower clients, whilst maintaining structure and control of meetings.

The service is available face-to-face, online and over the phone. This role will be delivered remotely with the face-to-face component being delivered separately. We will assess each client’s circumstances and level of need and adapt our support accordingly to make sure people get the support they need in the way they want to receive it.

This is a newly evolving service and as such post holders will be sensitive and flexible to changes in demand and delivery of the service.

 **Role profile**

**Help to Claim Assessor**

**Reports to: Advice Service Manager**

**Context of Role and Purpose**

## To provide assistance to those applying for Universal Credit by assessing eligibility, needs and capability, identifying deadlines or disadvantages and agreeing and facilitating the appropriate level of support within or outside of the advice service. The work will be delivered primarily on the phone and on webchat.

Discreet Advice may be given only once the relevant training has been completed and competencies are achieved for Universal Credit and associated benefit issues or with supervisor assistance.

**Main Duties**

**Assess Individual needs**

* Interview clients using sensitive listening and questioning skills in order to allow clients to explain their problem(s) and empower them to set their own priorities and where necessary act for the client using appropriate channels
* Triage clients who need assistance with applying for Universal Credit
* Assess their individual level of support needs.
* Use Citizens Advice resources to find, interpret and communicate the relevant information to clients and facilitate self-help or assisted information where possible
* Complete benefits checks when appropriate
* Identify more support to those who require it.

**Support the client to start a Universal Credit claim**

* Explore eligibility for Universal Credit
* Carry out a better off assessment
* Assist clients to fill in the initial application form and set up relevant online accounts
* Assess if a client needs additional support- advance payments, use of language line or needs a non – digital application
* Provide support to submit an application in a timely way so that entitlement is not disadvantaged and payments are not delayed.

**Help to receive the first payment**

* Ensure that clients are ready to receive their first UC payments by helping clients to:
  + Set up bank accounts
  + Gather evidence to support the claim if required
  + Apply for Alternative Payment Arrangements
  + Secure financial support such as Advance Payments
  + Understand their first payment
  + Understand their claimant commitment and how to work with their work coach

**Access to longer-term support**

* Signpost and refer to any other help they need either within the core CA service or through other organisations such as help with debt or personal budgeting.

**Research and campaigns**

* Support our research and campaigns work through various channels including case studies, data collection and client consent

**Administration**

* Ensure that all work meets quality standards and the requirements of the funder and reflects and supports the Citizens Advice service's equality and diversity strategy.
* Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.
* Complete required training to comply with quality assurance processes
* As required follow up on client outcomes for reporting purposes
* Ensure that all work conforms to your organisation’s systems and procedures

**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 Citizens Advice
* Abide by health and safety guidelines and share responsibility for own safety and that of colleagues

 **Person specification**

**Essential**

1. Ability to use sensitive listening and questioning skills to get to the root of the issues and empower clients, whilst maintaining structure and control of meetings with them
2. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively
3. Ability to use telephony and IT systems to deliver services across multiple channels for example webchat and telephone
4. Ability to use IT systems and packages, and resources in the provision of advice, record keeping and document production
5. Good IT knowledge with an ability to support clients with their online claim application
6. Ability and willingness to work as part of a team
7. A commitment to continuous professional development, including a willingness to develop knowledge and skills in advice topics
8. Ability to work in outreach settings with an understanding of information assurance and safety in those settings
9. Ability to develop and maintain positive working relationships with external stakeholders
10. Ability to commit to and work with the aims, principles and policies of the Citizens Advice service
11. A good up to date understanding of equality and diversity and its application to the provision of advice
12. Ability to monitor and maintain standards for advice provision and quality assurance

**Desirable**

Knowledge of the benefits systems including Universal Credit

Ability to carry out accurate benefit check calculations

Basic knowledge of multiple enquiry areas to aid with identifying emergencies and making referrals where appropriate

In accordance with Citizens Advice national policy, we may require the successful candidate to be screened by the DBS. However, a criminal record will not necessarily be a bar to your being able to take up the job.

 **Terms and conditions**

The terms are:

* This is initially a fixed-term contract of up to 31 March 2022 subject to further project funding.
* Hours - 18.1 hours a week (0900-1700) - to be confirmed, worked over 3 - 4 days, with some flexibility subject to line manager approval
* Start date 1 July 2021 (Training available to start from 1 June 2021)

Pay – FTE £20,000 - 22,000 pro-rata subject to experience

Our standard terms and conditions include

* 37.5 hours is an FTE working week 0900-1700 with 30-minute break
* 33 days holiday including bank holidays ( holiday year runs January – December)
* 5% employer pension contribution to People’s Pension personal pension scheme- with 3% minimum employee contribution

**  What we give our staff**

One of our key strategic objectives is to ‘Make Us a Great Place to Work and Volunteer’.

We provide an Employee Assistance Programme for all paid staff including a confidential helpline, counselling and other benefits.

We prioritise learning and development to both fulfil individual potential and to meet our strategic plan objectives. We also foster a supportive team approach reflected in our behaviours to each other including well-being and dignity at work.

Our Trustee board ensures that our workplace is a healthy and safe one and reviews policies to ensure they are fit for purpose and available to all.

We conduct an annual people survey which gives us feedback about how we can improve our support to those who work and volunteer for us and we hold regular team meetings to improve communication and teamwork.