

# Perth Citizens Advice Bureau



## Help to Claim Adviser

### Applicant Information Pack



# Thank you for your interest in our vacancy!

Perth Citizens Advice Bureau (CAB) has been operating in Perth and Kinross since 1942 and throughout the past eight decades we have been responding to the needs of citizens and providing advice and information on a range of topics including money advice, benefits and debt, energy advice, consumer issues, family issues, employment, immigration and housing issues.

We have a team of 34 staff and 30 volunteers and together we support over 8,000 individuals each year.

The CAB service is vital for the communities we serve, from Kinloch Rannoch to Coupar Angus, from Comrie to Kinross. We support any citizen in Perth and Kinross with high quality advice and information supporting them at all stages of life.



# Our Aims

- To ensure that individuals do not suffer through lack of knowledge of their rights and responsibilities or of the services available to them, or through an inability to express their needs effectively and equally
- To exercise a responsible influence on the development of social policies and services, both locally and nationally

# Our Principles

**Free**

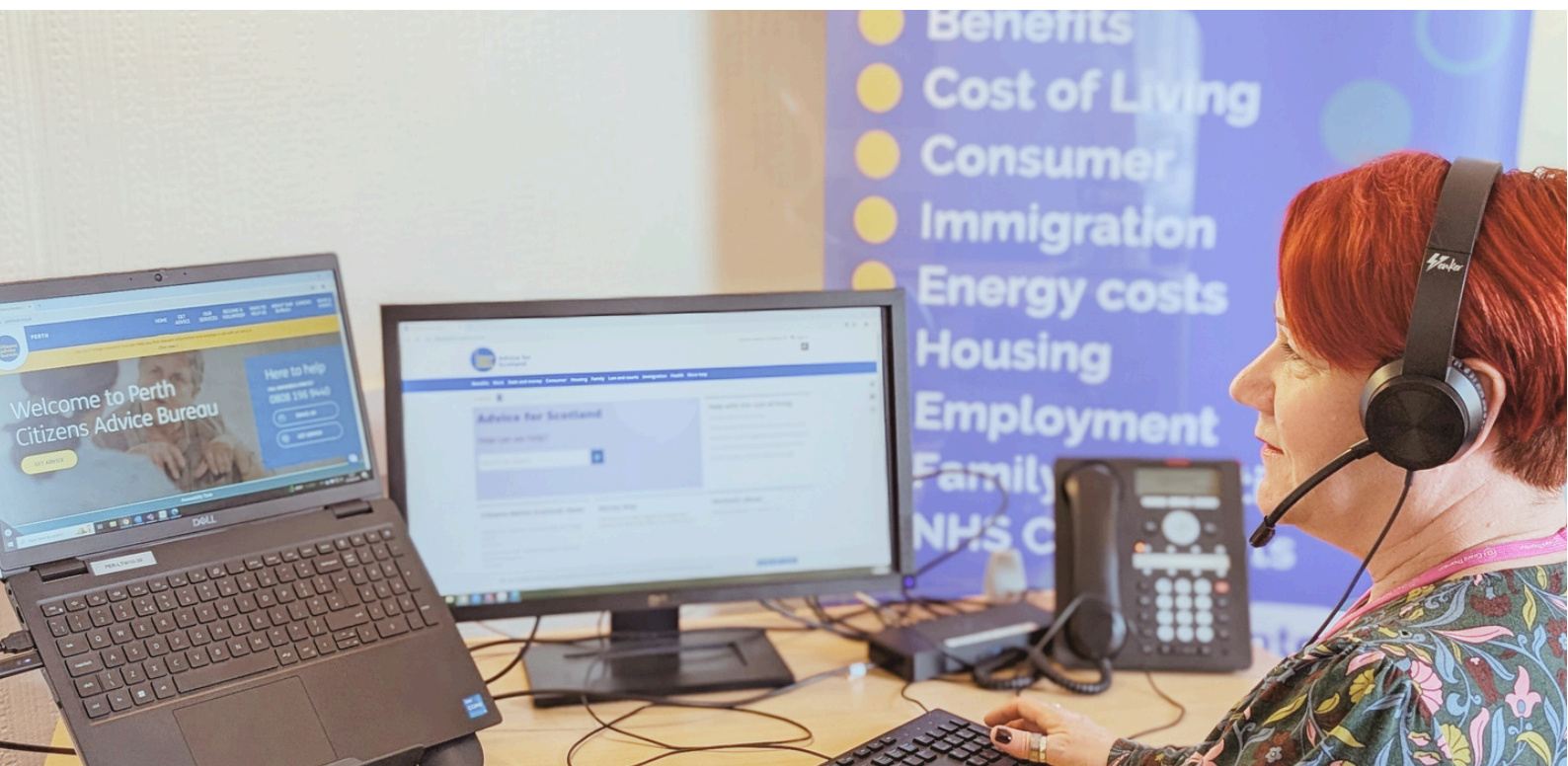
**Confidential**

**Impartial**

**Independent**

**Accessible**

**Effective**



# Our Vision

- We believe that everyone in Perth and Kinross should have access to free, impartial and confidential advice that helps them make informed decisions whenever they need it
- Our vision is a Scotland where everyone has the advice and information they need to realise their rights and where barriers to accessing those rights are effectively challenged

# Our Mission

- We help people navigate systems and access their rights
- We build resilience in local communities
- We support the realisation of human rights
- We help change policies and practices to ensure they work for people





## Why work with us?

Our team of staff and volunteers are our greatest strength and make Perth CAB a great place to work.

Work/life balance is as important to us as it is to you and our working practices support this as much as possible. We offer generous annual leave and flexible working opportunities. Hybrid and remote roles are available.

We strive to have a work environment where staff thrive in their roles and ensure that staff have all the tools and learning opportunities to carry out their roles enjoyably and to the best of their abilities.

Our cultural values are:

- Empowering
- Supportive
- Inclusive
- Collaborative



# The Role

<b>Job Title:</b>	Help to Claim Adviser
<b>Responsible to:</b>	Benefits Team Lead
<b>Location:</b>	Home Based in Scotland (travel to Perth Office 6 times per year)
<b>Hours per week:</b>	35
<b>Salary:</b>	£26,167 - £28,669

## Summary of Main Responsibilities

A Help to Claim 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 and webchat.

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 (such as drug and alcohol support). The adviser should maintain local connections with partner organisations and the DWP within their region.

## Main Responsibilities

- To conduct telephone, web chat 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, alcohol and drug support organisations, 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

## Knowledge, skills and experience

### Essential

- 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
- Ability to work remotely and as a part of a virtual helpline team





# How to apply

To apply please complete the accompanying application form by the closing date of **Friday 11th October**

We would welcome any approach for an informal chat to discuss this role. To set up a time to chat with Fraser Miller, Our Benefits Team Lead please email [finance-hr@perthcab.org.uk](mailto:finance-hr@perthcab.org.uk)

