Argyll & Bute Citizens Advice Bureau

Triage Assistant: Job Description

Job Title: Triage Assistant

Hours: 25-30 by mutual arrangement

Fixed Term Contract: Until 31 March 2026 (with possible extension)

Salary: £24,969 per annum (pro rata)

Location: Helensburgh or Lochgilphead

 **Summary of Role**

This is an entry level role within our employability project. All training and support will be provided and may suit a school or college leaver in addition to individuals seeking to return to the workplace.

Following training, the Triage Assistant will play a key role in delivering an independent, free, impartial and confidential advice, information and advocacy service to Association standards. This position provides a triage support service to assess client needs at the earliest opportunity, effectively prioritising support and enabling more efficient appointment/resource management.

The Triage Assistant will help advise and direct on issues including:

- Benefits and Income maximisation, Budgeting, Money and Debt, Housing, Relationships, Employment, Legal matters

This role may be of particular interest to individuals seeking a career in administrative or advice services, but may not currently be able to demonstrate academic qualifications.

**Key Responsibilities**

* Client Support and Assessment
* Answer bureau advice line during opening hours and record client enquiries
* Assess clients' needs and establish required level of support using sensitive listening and questioning skills
* Identify emergencies and triage appropriately, ensuring correct type and level of support
* Refer to Session Supervisor for emergency assistance
* Direct clients to appropriate form of advice after gathering comprehensive information
* Provide internal and external referrals for advice, representation, and poverty initiatives throughout Argyll & Bute
* Assess benefit eligibility and arrange adviser appointments as necessary
* Explore clients' circumstances, support needs, and access preferences, considering:
	+ Language barriers
	+ Accessibility requirements
	+ Digital access and capability

**Knowledge and Professional Development**

* Maintain and develop appropriate knowledge of relevant legislation (debt, welfare rights, benefits)
* Coordinate client needs and liaise with specialist bureau staff and relevant agencies
* Attend team and staff meetings as required
* Participate in identified training sessions
* Monitor changes in Social Security Benefits Legislation
* Attend internal and external training courses as appropriate

**Record Keeping and Administration**

* Maintain accurate case records and files in both written and electronic form
* Follow national standards and CAS quality assurance guidelines
* Record, update, and maintain case management system information for:
* Continuity of casework
* Information retrieval
* Statistical monitoring
* Report preparation

**Compliance and Standards**

* Work within CAB service aims and values
* Follow health and safety guidelines
* Maintain responsibility for personal safety and that of colleagues and clients
* Support Citizens Advice service's equality and diversity values
* Comply with Quality Assurance/National Standards policies
* Assist in bureau Quality Assurance development
* To inform the Chief Officer about workload monitoring and CAB performance are at risk of not being met and any reasons for unmanageable demand or under-performance
* Identify solutions to resolve any high demand or under-performance on targets and engage positively in discussions with the Chief Officer to achieve the required levels
* **Values**
* Part of the key responsibilities of all employees of the CAB and Citizens Advice Scotland are upholding the behaviours and principles of the organisation as detailed below:
* Person-centred: We are committed to the wellbeing of our clients, volunteers and staff and take a whole person approach to our work
* Empowering: we invest in people & support them to take action on challenges they face
* Supportive: We are caring and respectful and make sure that people receive support they need to improve their lives
* Inclusive: a non-judgemental, friendly & offer expert service to anyone in need of our help
* Collaborative: We work together as a network and with other partners in an open, respectful way, to build trust even when opinions differ
* **Team work and behaviours**
* Share relevant information and give support and encouragement to colleagues, in team meetings, with staff and volunteers, in development days, and training events
* Ability to receive feedback and a willingness to challenge constructively
* Willingness to work in a team, with kindness and non-judgemental attitude towards colleagues
* To support the principle of volunteerism in citizens advice
* Maintain and monitor effective and efficient administrative systems
* Demonstrate understanding of social trends and their implications for service provision
* Assist with creating shadowing opportunities and delivery of training when required
* A willingness to learn and reflect on practice, and developing your own standards
* **Self-Management & Personal Development**
* Take responsibility for personal safety in and out of offices in accordance with CAB policies
* Participate in the support, supervision and appraisal process with the Chief Officer
* Identify own learning needs and learning opportunities when required, and feeding back
* With the Chief Officer, identify and address your training and development needs
* **Service Development & Working in Partnership**
* To undertake recommendations from the Chief Officer with regards to planning and developing the CAB service in order to meet specific contract requirements
* To contribute information and reports relevant to your role
* To assist with the promotion of ABCAB to the wider community
* Contribute to the collation of statistical data, incl Annual Report and newsletter
* Contribute out relevant research and consultation exercises
* Assist in developing and gathering evaluation feedback from clients and partners
* To make appropriate referrals to key partner agencies, for valid support for clients or to other advisers as appropriate where there are other related problems such as employment
* Present a positive image of the CAB at all times
* **CAB Development**
* To contribute to the development of the CAB, its impact and services
* To participate in ensuring CAB policies are put into practice, with colleagues
* To contribute to gathering of information for local and national social policy work
* To attend relevant meetings with board of Trustees, e.g. Annual General Meeting
* The above job description is not exhaustive and include duties inherent in post as reasonably requested by the Chief Officer

**Requirements**

Please note that the post is subject to the disclosure of criminal history information and satisfactory references.

About Argyll & Bute Citizens Advice Bureau

Scottish Charity Number [SC030477]

AUG 2025