

# Help to Claim Welfare Rights Adviser

<b>Job title</b>	Help to Claim Welfare Rights Adviser
<b>Location</b>	Leeds/ Home (Hybrid)
<b>Hours/Contract</b>	<ul style="list-style-type: none"><li>• Multiple roles are available to 31.3.2023</li><li>• We will consider applications for part-time and full-time posts</li></ul>
<b>Reporting to</b>	Service Delivery Manager
<b>Salary scale</b>	Points 18-22

## Job description

### Purpose and scope of the job

As part of our Help to Claim team you will help people to make claims for Universal Credit through to their first payment. You will guide people through the claims process, offering them tailored support helping them to get to their first payment and ensuring that they are able to manage it when it is in payment. You will also assist claimants with matters such as carrying out benefits checks and form filling. You will also identify appropriate referrals for advice needs outside the scope of the project.

You will play a key role in ensuring clients receive good quality advice via telephone and digital channels and will contribute to team rotas, targets and KPI's.

### Duties and responsibilities

#### 1. Advice

- 1.1. Deliver Universal Credit advice via a variety of methods including telephone, webchat and video calls.
- 1.2. Provide one-off advice and undertake follow-up work and casework as required, ensuring that all advice and casework conforms to the Citizens Advice Quality of Advice requirements and organisation procedures.
- 1.3. Assess advice needs, providing the level of service appropriate to the client's needs.
- 1.4. Carry out benefit entitlement checks and better off calculations.
- 1.5. Deliver one to one support to complete their claim and be ready to

receive the first payment, assisting clients to submit their digital or phone claim.

- 1.6. Assist clients with preparing for mandatory reconsiderations, appeals.
- 1.7. Participate in the team rota to provide telephone/webchat access Monday to Friday, 8am to 6pm.
- 1.8. Work as part of a wider team to ensure that service standards are met including the achievement of individual and team targets and KPI's, ensuring that they are consistently met.
- 1.9. Ensure case records are input and maintained in accordance with the Citizens Advice Quality of Advice requirements and organisational procedures.
- 1.10. Assess advice needs and make appropriate referrals both internally and externally for casework/specialist advice, as appropriate.
- 1.11. Provide cover for sessions in case of staff absence.
- 1.12. Participate in client feedback procedures
- 1.13. Contribute to and record all relevant project monitoring and evaluation data as per project requirements.

## **2. Professional Development**

- 2.1. Keep up to date with relevant online systems, legislation, policies and procedures relating to Universal Credit/ Welfare Benefits and attend appropriate training relevant to the area of support..
- 2.2. Prepare for and attend relevant internal and external meetings as agreed with the line manager.
- 2.3. Participate in organisational initiatives to develop and improve services.
- 2.4. Identify own training needs and agree with line manager training and development activities to be undertaken.
- 2.5. Prepare for and attend supervision sessions.

## **3. Other duties and responsibilities**

- 3.1. Identify and carry out appropriate Research and Campaigns work, in accordance with organisational procedures including documenting evidence forms on casebook and alerting clients to our research and campaigns work.
- 3.2. Maintain positive, professional working relationships with a range of local organisations to further good quality of advice and Research and Campaigns work.
- 3.3. Work closely with the other services at CAL and Citizens Advice in order to establish good referral links.
- 3.4. Participate in the development of literature to promote the service,

including self-help materials as appropriate.

- 3.5. Adopt a continuous development approach to help ensure that Citizens Advice Leeds provides high quality services, meeting the requirements of grant/contractual agreements, quality standards, partners and service users.
- 3.6. Promote the aims, principles and membership requirements of the Citizens Advice service.
- 3.7. Abide by and assist in the implementation of office policies and procedures including health and safety, IT, information assurance, safeguarding and equalities and diversity policies.
- 3.8. Present a professional appearance, help maintain an orderly working environment and act at all times to uphold the good reputation of Citizens Advice Leeds.
- 3.9. Carry out any other relevant duties as determined by the line manager to ensure the effective delivery and development of Citizens Advice Leeds services.

## Person specification – Help to Claim Welfare Rights Adviser

	Essential	Qualified	Trainee
1.	Up to date working knowledge, experience (In last 3 years ) and understanding of delivering welfare benefits and Universal Credit advice working to advice quality standards.	✓	
2.	Ability to give advice, identify clients' problems and seek to resolve them (competent to general advice level as a minimum)	✓	
3.	Ability to interpret complex information and convey it in a way that is understandable to clients.	✓	
4.	Knowledge of rules and procedures relating to mandatory reconsideration and appeals.	✓	
5.	Certificate in generalist advice work or equivalent qualification. Or equivalent level of experience and skill in advice work	✓	

6.	Experience of engaging with clients/customers through telephone and digital channels.	✓	✓
7.	Proven ability and willingness to meet appropriate targets, including organizational objectives and funder targets.	✓	✓
8.	Experience of conducting quality checks/ file reviews, assess quality of advice and give feedback	✓	
9.	Excellent IT skills with a thorough knowledge of IT office applications, including experience of using case management systems to carry out daily duties	✓	✓
10.	Ability to work under pressure to meet deadlines.	✓	✓
11	Excellent decision making, organisational and problem solving skills	✓	✓
12	Good literacy and numeracy skills relevant to the role.	✓	✓
13	Positive approach to working in a team and contributing to wider organisation goals.	✓	✓
14	Ability to work flexibly to meet service targets and to participate in a rota to cover delivery Monday-Friday 8am – 6pm.	✓	✓
15	Ability and willingness to travel for business purposes including, training and other events as required.	✓	✓
16	Proactive approach to personal development and the updating of skills and knowledge.	✓	✓
17	Professional work ethic: honest, conscientious, self-motivated and reliable.	✓	✓
18	Demonstrable commitment to Citizens Advice Leeds' values of fairness, equality and social justice.	✓	✓

	<b>Desirable</b>	<b>Qualified</b>	<b>Trainee</b>
1.	Experience of delivering a casework service to clients	✓	

2.	12 months recent (in last 3 years) experience of generalist advice work.	✓	
3.	Thorough knowledge of advice subjects at generalist level, including housing and debt.	✓	
4.	Evidence of MAS Accreditation - advice work, casework and court representation levels	✓	
5.	Experience of working in an advice centre setting.		✓