



# Help to Claim adviser

## Job pack

Thanks for your interest in working at Citizens Advice Mid Mercia. 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 CORE values
- 3 things you should know about us
- Overview of Citizens Advice
- The role profile and personal specification
- Terms and conditions

### **Want to chat about this role?**

If you want to chat about the role further, you can contact Roger Balcombe by emailing [rbalcombe@citizensadvicemidmercia.org.uk](mailto:rbalcombe@citizensadvicemidmercia.org.uk) or by calling 07525 986787

# Our CORE values

**Communicate:** We will be consistent, positive, passionate, and listen

**Ownership:** We will be accountable, make a difference, meet deadlines, keep promises and have solutions

**Respect:** We will be honest, work with integrity, trust each other, be fair, tolerant and stand for equality

**Effective:** We will deliver quality, focus on detail and be professional

## 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.

# Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

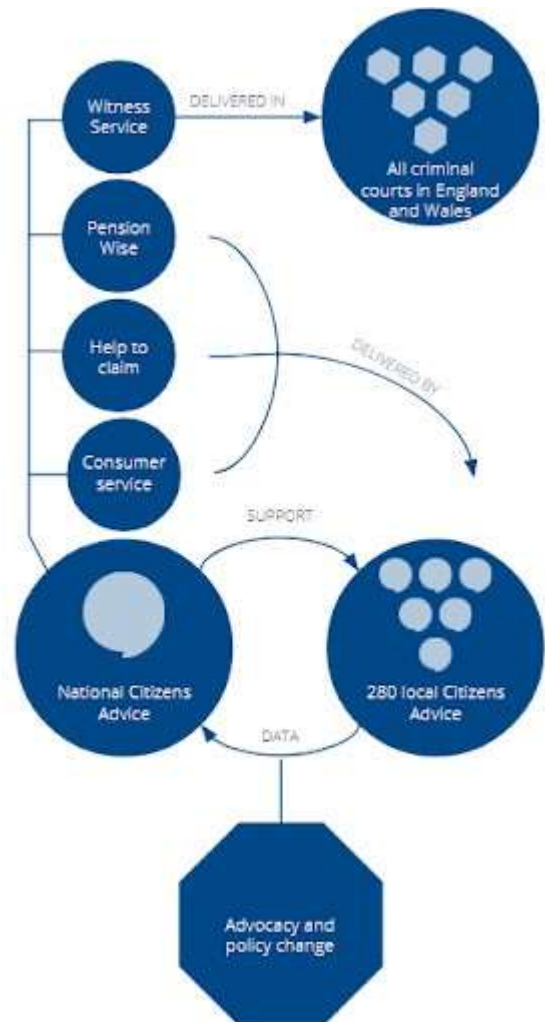
This role sits within our network of independent charities, delivering services from

- 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 set to deliver a new service called 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.



## Role profile

### Advice giving

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

Supporting clients virtually to use IT to make their new Universal Credit claim

Use Citizens Advice resources to find, interpret and communicate the relevant information to clients

Complete benefits checks when appropriate

Research and explore options and implications so that clients can make informed decisions.

Act for the client where necessary using appropriate communication skills and channels.

Refer internally or to other specialist agencies as appropriate.

Ensure that all work meets quality standards and the requirements of the funder

Ensure that work 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 the required training to comply with quality assurance processes

## **Research and campaigns**

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

## **Professional development**

Keep up to date with legislation, policies and procedures and undertake appropriate training

Read relevant publications

Attend relevant internal and external meetings as agreed with the line manager

Prepare for and attend supervision sessions/team meetings/staff meetings as appropriate

## **Administration**

Use of telephony and IT equipment for multichannel delivery of advice services

Use of IT software for statistical recording of information relating to research and campaigns and funding requirements, record keeping and document production. Ensure GDPR compliant training is completed on an annual basis

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

Meet daily and monthly targets as agreed by your Line Manager.



# Person specification

## Essential

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

Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively

Ability to use telephony and IT systems to deliver services across multiple channels for example webchat and telephone

Ability to use IT systems and packages, and resources in the provision of advice, record keeping and document production

Good IT knowledge with an ability to support clients with their online claim application

Ability and willingness to work as part of a team

A commitment to continuous professional development, including a willingness to develop knowledge and skills in advice topics

Ability to develop and maintain positive working relationships with external stakeholders

Ability to commit to and work with the aims, principles and policies of the Citizens Advice service

A good up to date understanding of equality and diversity and its application to the provision of advice

Ability to monitor and maintain standards for advice provision and quality assurance

Ability to work remotely with occasional travel to offices across South Derbyshire and Derby City.

## 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



# Terms and conditions

## Location

Citizens Advice Mid Mercia – Working remotely with occasional travel to South Derbyshire and Derby City offices

## Pay Rate

£22,308 per annum

## Type of contract

Fixed term

## End date of contract

31 December 2025

## Reports to

Advice Project Lead

## Work Pattern

37.5 hours per week – Hours between 8.00am - 6.00pm Monday to Friday (based on rota system)

## Start date

ASAP

## Probation Period

9 months – with possible extension if performance review is required

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