

## FALKIRK CITIZENS ADVICE BUREAU

### HELP TO CLAIM ADVISER

<b>Job title</b>	Help to Claim Adviser (Universal Credit)
<b>Employer</b>	Falkirk Citizens Advice Bureau
<b>Hours per week</b>	35
<b>Type of contract</b>	Fixed-term until 31 December 2025
<b>Salary</b>	£26,499

#### About the role

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, web chat and video call.

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.

The adviser will be line managed by their local bureau manager but will be operationally responsible to the Citizens Advice Scotland Operations Officer for providing their regional service and local knowledge. They will be required to liaise with the Operations Officer regarding their shifts, helpline coverage and holiday requirements.

#### Key responsibilities:

- To conduct telephone, web chat and video call 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 management team.

**HELP TO CLAIM ADVISER  
PERSON SPECIFICATION**

**E – Essential**

**D – Desirable**

HELP TO CLAIM ADVISER	COMPETENCIES
<b>QUALIFICATIONS</b>	<ul style="list-style-type: none"> <li>• Demonstratable completion of Citizens Advice Bureau Adviser Training Programme <b>D</b></li> </ul>
<b>EXPERIENCE</b>	<ul style="list-style-type: none"> <li>• Experience of working with people with multiple and complex needs <b>E</b></li> <li>• Experience of using a range of IT tools to carry out work, including case management systems, Microsoft Office, internet and email etc. <b>E</b></li> <li>• 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.) <b>E</b></li> <li>• Experience working on helpline, webchat and video conferencing (Near Me) <b>D</b></li> </ul>
<b>SKILLS AND ATTRIBUTES</b>	<ul style="list-style-type: none"> <li>• Good written and oral communication skills <b>E</b></li> <li>• Understanding, maintaining and practising high standard of case recording requirements as according to the Help to Claim project specification and the CAS quality assurance standards <b>E</b></li> <li>• 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 <b>E</b></li> <li>• Ability to work without supervision and prioritize workload <b>E</b></li> <li>• Excellent oral and written communication skills, including the ability to communicate complex information in a clear and accessible manner <b>E</b></li> <li>• Excellent organisational skills <b>E</b></li> <li>• Ability to operate as a team player and communicate effectively with colleagues and managers <b>E</b></li> <li>• A proven ability to work effectively with a wide variety of stakeholders <b>D</b></li> <li>• Potential ability to work remotely and as a part of a virtual helpline team <b>D</b></li> </ul>



<b>VALUES AND ATTITUDES</b>	<ul style="list-style-type: none"><li>• A commitment to the aims and principles of Citizens Advice Service <b>E</b></li><li>• Commitment to equality of opportunity <b>E</b></li></ul>
<b>KNOWLEDGE</b>	<ul style="list-style-type: none"><li>• A sound working knowledge and experience with social security benefits and entitlement, with specific focus on Universal Credit <b>E</b></li><li>• Knowledge of a range of enquiry areas to aid with identifying emergencies <b>E</b></li></ul>
<b>OTHER</b>	<ul style="list-style-type: none"><li>• Must be willing to work a varied shift pattern (07:45 – 19:00 Monday – Friday) and during specified holidays, including the Christmas and Easter periods, subject to the needs of the bureau/Forth Valley Help to Claim Consortia <b>E</b></li><li>• The post is subject to the receipt of a satisfactory Basic Disclosure Certificate <b>E</b></li><li>• The post is subject to the disclosure of criminal history information <b>E</b></li></ul>

**The Falkirk Citizens Advice Bureau is committed to equal opportunities both in service provision and employment.**