Job Description

Casework Support Officer – Money Advice Team

Job Title: Casework Support Officer – Money Advice Team
Salary Scale: £18,300 (increasing to £19,500 after 6 month probation)

Hours: Full-time
Responsible to: Deputy Operations Manager

Key Work Area:	This vital role supports the work of our busy Money Advisers, who work with local clients to help them deal with their debts. Every year our advisers help write-off more than £1m of client debt. Our Casework Support Officers help make this possible by supporting both the clients and the caseworkers. You'll process referrals into the team, conduct debt assessments over the phone or face-to-face - creating the financial statements used by the Money Advisers in their advice appointments, prepare applications for debt solutions, help clients to make claims for welfare benefits, and conduct regular review appointments with clients to check progress and agree next steps to progress cases. A large part of the role is supporting the advisers to ensure we're helping our clients as efficiently as we can. You'll be the first point of contact for our clients when they call us about their case, helping to resolve their enquiries where possible, or passing on information to the relevant adviser where the query is more complex. You'll support our clients to provide information and documents we need, check details and ask questions to gather information, and provide updates to them on the progress of their case. You'll obtain credit reports for clients to find out details of their debts, and you'll write letters and send emails to their creditors to request information, offer token payments, or to request accounts be placed on hold. When a Caseworker is preparing an application for a debt solution for a client, for example a Debt Relief Order, you'll help them draft this and chase up any missing information from either the client or their creditors. Everything we do gets recorded on Casebook, our Case Management System, and you'll create case notes, update financial information from letters and emails received in the client's budget plan, update client profile information, and upload electronic copies of documents to make sure every bit of information related to a client's case is contained in their electronic case record.

Key Responsibilities

Service Delivery - Casework

To support our team of specialist Money Advisers with their active caseloads, which will involve helping clients via several different channels – by telephone, face-to-face, email, webchat and video calls.

Helping clients progress their case by:

- Assisting clients with queries relating to their case
- Supporting clients to obtain or prepare information needed to progress their case
- Conducting review appointments with clients using sensitive listening and questioning skills, to allow clients to explain their progress and any barriers, and empower them to set their own priorities by agreeing next steps
- Writing letters, preparing factsheets and other information sources and sending to clients
- Use a range of information sources including the Citizens Advice AdviserNet website, CPAG Debt Advice Handbook, legislation, and case law to research, find interpret, and communicate relevant information to clients, creditors and colleagues.
- Act for the client where necessary by calculating, negotiating, drafting, or writing letters and telephoning creditors or public bodies.
- Reviewing and updating client budget plans and financial statements based on information from clients, creditors, and credit reference agencies
- Preparing and submitting applications for charitable grants on behalf of clients
- Preparing Debt Relief Order and Bankruptcy applications on the Insolvency Service website
- Supporting clients to apply for benefits such as Discretionary Housing Payment or Council Tax Reduction
- Sitting-in/observing Money Advice appointments from time-to-time to develop subject knowledge and/or assist the adviser with note-taking
- Identifying other issues affecting the client that arise during the case, and making referrals to other teams and external organisations, or signposting to sources of support where appropriate
- Assisting the Money Advisers with ad-hoc tasks relating to cases as required

Debt Assessment

- Monitoring incoming referrals and process these in line with office procedures
- Conducting interviews with clients to create a budget plan for them, based on

information they provide to us about their debts, assets, income and expenditure

- Triaging cases and deciding the most appropriate advice channel for the client based on the complexity of their case, any emergencies, vulnerabilities and the client's capability

Administration

- Answer incoming telephone calls, refer calls or take messages
- Manage the shared calendar for client appointments
- Process incoming and outgoing post, end emails received into the team's shared mailboxes
- Scan documents and attach to client's case files on the Case Management System, filing originals and returning these to clients when cases are closed
- Review and update Standard Operating Procedures (SOPs) for the team as needed

Case Management

- Maintain up to date and accurate case records for the purposes of continuity of casework, information retrieval, statistical monitoring, and report preparation.
- Ensure that all casework conforms to the organisations Office Manual, FCA requirements, and quality standards set by the Money and Pensions Service (MaPS)

Social Policy

- Keep up to date with current Citizens Advice research and campaigns
- Identify and flag potential evidence of social policy issues

Professional Development

- Undertake all appropriate training for the role, including self-led learning on the Citizens Advice Adviser Learning Pathway and debt-specific training from external providers
- Assist with initiatives for the improvement of the service
- Identify opportunities for further personal development

Administration

- Attend all internal and external meetings as agreed with line manager, taking minutes if required
- Prepare for and attend regular open case reviews and supervision sessions with line manager
- Ensure all work conforms to the organisation's systems and procedures
- Process client data in accordance with Data Protection law
- Support the equality, diversity and rights of clients and colleagues, behaving in a manner which is welcoming, non-judgemental and respects circumstances, priorities and rights
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues

- Demonstrate a knowledge of, and commitment to, the aims and values of Citizens Advice
- Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service

Person Specification

Casework Support Officer – Money Advice Team

Criteria	Essential	Desirable
Qualifications	Either GCSE Maths and English at grade C or higher, or equivalent, including qualifications obtained outside the UK	Has completed training in advice work
Skills/competencies	Excellent verbal and written skills Ability to write clearly and accurately, communicate effectively face to face and on the phone Ability to talk to people from all backgrounds and at all levels Ability to discuss personal and sensitive information with clients in a confident, respectful and non-judgemental manner Excellent IT skills and fully proficient at using Microsoft Office applications Numeracy skills and the ability to work with numbers, performing simple calculations and understanding the data.	An interest in future development towards a Money Adviser role
Experience Required	Experience of working with a diverse range of people Experience of working with IT systems and Microsoft packages	Experience of working in a customer facing role Experience of working in an office-based environment Knowledge of personal finances and budgeting Proven experience of managing a caseload

		Experience working in the charitable sector, or in a finance-related role
Personal attributes	Ordered approach to work and an ability and willingness to follow and develop agreed procedures Ability to take a brief, ensure the task is understood and then work independently. Ability to maintain a high level of accuracy and attention to detail in all work Ability to manage a varied workload, prioritise and meet deadlines under pressure.	
Personal qualities	Polite, courteous and professional Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively Ability and willingness to work as part of a team Ability to monitor and maintain own standards Ability to work on own initiative	