



# Universal Credit: Help to Claim Adviser

## Job pack

Thanks for your interest in working at Citizens Advice Taunton. 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 values
- 3 things you should know about us
- Overview of Citizens Advice and Citizens Advice Taunton
- The role profile and personal specification
- Terms and conditions
- What we give our staff

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

If you want to chat about the role further, you can contact Rhoda Cooke by emailing [rhoda.cooke@tauntoncab.org.uk](mailto:rhoda.cooke@tauntoncab.org.uk) or calling 01823 448955.

# Our values

**We're inventive.** We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

**We're generous.** We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

**We're responsible.** We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

## 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.

## How Citizens Advice Taunton works

Citizens Advice Taunton (CA-T) delivers advice and support to more than 7,000 people living and working in Taunton Deane. We do this by providing the following services:



**Generalist Advice Service** – face-to-face advice delivered by our team of 80+ volunteer receptionists, advisers and administrators who are supported by paid Advice Supervisors. In 2019/20 our advice teams helped 7,932 clients with nearly 24,000 issues.



**Somerset Adviceline** – a telephone advice service delivered in partnership with all Somerset Citizens Advice offices. The service is staffed by volunteer advisers.



**Email advice** – we deliver advice via our website email submission form. This The service is staffed by volunteer advisers and ensure that people who cannot call or visit receive the same quality advice service.



**Outreach Services** – face-to-face advice delivered by volunteer advisers. These services are delivered in Wellington, Priorswood and Halcon.



**In-reach Service** – face-to-face advice delivered by a paid specialist adviser to inpatients at Wellsprings Hospital and Wellesley Hospital.



**Equality and Diversity** – We apply core values of dignity, respect, equality and non-discrimination, based on our common humanity. We seek to foster empowerment and participation at all levels,



**Research & Campaigns** – we collect evidence of the issues facing our clients and we use this evidence to challenge unfairness and influence decision makers at local, regional and national level.



**Dedicated Projects** - We work in partnership with the Local Authority, Macmillan Cancer Support, Wessex Water, MS Society and many more local and national partners to deliver a number of additional paid staff projects, including:

**One Teams Money Matters:** our one team money matter advisers provide debt advice to people living in a one team area (Wellington, Halcon and Priorswood or are referred to them by one team workers.

**Macmillan Benefits Advice Service:** provides benefit advice and Macmillan grant applications to people affected by cancer. The service is delivered by telephone, email, and face-to-face at our main office, the hospital, the Beacon Centre, St Margaret's Hospice and at home visits.

**Multiple Sclerosis Access-to-Advice:** provides advice and information on any subject to people affected by MS in the Taunton Deane area. The service is delivered by telephone, email, and face-to-face at our main office or at home if the client is housebound.

**Pension Wise:** guidance appointments are available for people approaching retirement or aged 50 or over, have a defined contribution pension, and have not had a guidance appointment before. Appointments are delivered across Somerset and beyond.

**Litigants in Person:** funded by the Community Justice Fund this project provides advice and assistance to survivors of Gender Violence and Abuse, to help them understand and complete the court processes required to arrange the protection they need from their perpetrator.

**Open Mental Health:** Working in partnership with an array of statutory and voluntary agencies to support people experiencing mental health difficulties to access to specialist mental health services, housing support, debt, benefit and employment advice.

**Homelessness Reduction Act Debt:** this is for clients approaching the local housing authority under the Homeless Reduction Act (which extended housing authority duties to people who were previously ineligible for their help), and is funded by them. Our role is to provide debt advice to those in potential housing need with the aim of averting homelessness.

**Psychiatric in-reach advice:** we provide a holistic advice service to in-patients at two local hospitals, helping them to prepare for their return to the community, or to manage their affairs during their treatment.

**Money and Pensions Service capacity building project:** this project was set up to increase the availability of debt advice following the upturn in financial hardship resulting from the Covid pandemic.

## **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.

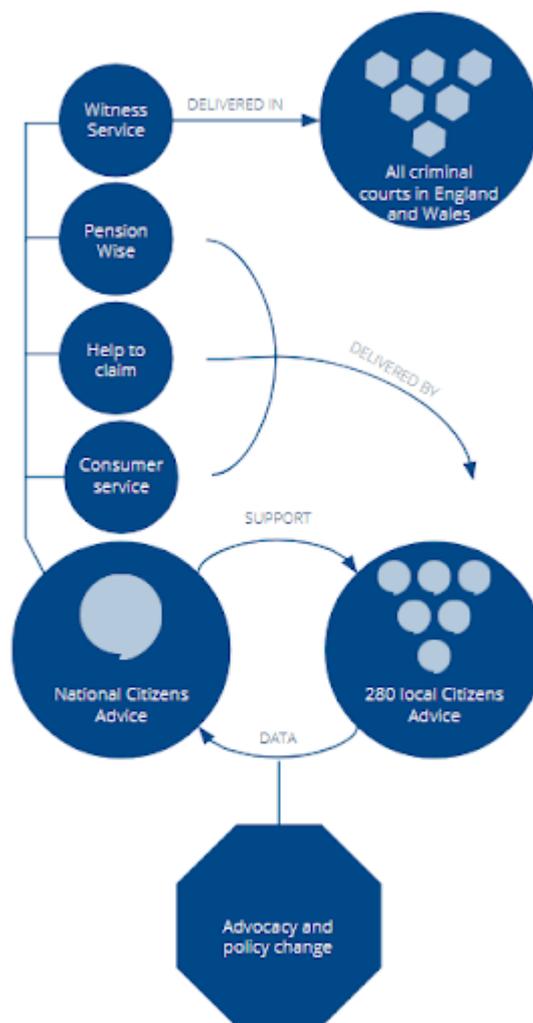
This role sits our network of independent charities, delivering services from

- 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 Citizens Advice aims:**

To provide the advice people need for the problems they face.

To improve the policies and practices that affect people's lives.

**The Citizens Advice principles:**

To provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities.

 **The role**

**Context of role:**

Responsible to the Operations & Advice Manager.

**The Opportunity & Role purpose:**

Citizens Advice delivers a service called "Universal Credit: 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 understand their entitlement, make and complete their new Universal Credit claim and get ready for their first payment. You will also have a commitment to the aims and principles of the Citizens Advice Service.

**Salary:** £ 20,807 (pro rata)

**Hours:** 6 hours per week (across 2 days preferably)

**Job location:** Taunton

**Contract type:** Fixed term until 31/03/2022



## Job description

**Service Delivery:**

- Complete the required training to comply with quality assurance processes and meet project key performance indicators/targets.
- Engage with clients to assess individual support needs to determine the most appropriate level of service.
- Actively promote the use of self-help information or assisted access to digital information as appropriate.
- Support and assist clients to:
  - access appropriate websites and identify relevant forms and self-help information
  - access, download and print off relevant information to complete online claim forms
  - develop the skills and confidence to access digital services.
- Where assisted digital access will not meet the client's needs, assist them to start their Universal Credit claim. This may include:
  - setting up a personal email account for claimants
  - setting up a new bank account
  - accessing online gateway and setting up a Universal Credit account

- assisting the client to complete the tasks required.
- Where a valid claim has been accepted, supporting the client until such time as they receive their first payment. This may include:
  - helping the client verify their identity
  - providing and uploading any additional information or evidence that the DWP may require
  - setting up an account
  - making or reviewing online journal entries
  - notifying any change of circumstances
  - preparing for DWP work coach appointments
  - providing basic budgeting support including accessing emergency financial support e.g. foodbank vouchers, research and campaigns.
- Collect evidence to highlight any problem areas and provide case studies to demonstrate the impact of the project.
- Maintain case records for the purpose of continuity, information retrieval, statistical monitoring and report preparation. Ensuring that all quality criteria is met.
- Work in a variety of settings – if needed – including community outreach, Jobcentres and local authority offices as required.

### **Professional development:**

- Keep up to date with legislation, policies and procedures, undertake appropriate training and 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 multi-channel 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 and followed at all times.
- Ensure that all work conforms to our organisation's systems and procedures.
- Keep up to date with policies and procedures relevant to our organisations work and undertake appropriate training.

### **Other duties and responsibilities**

- Carry out any other relevant administrative and support duties required to ensure effective delivery of the Universal Credit: Help to Claim 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.



# Person specification

## Essential

1. Recent and experience of generalist and/or benefit advice service delivery, preferably but not exclusively in a Citizens Advice setting.
2. Demonstrate knowledge and experience of welfare benefits advice including Universal Credit and Legacy benefits, with the ability to meet Citizens Advice competence requirements (with appropriate training if necessary).
3. Proven 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 with them.
4. Excellent numeracy, literacy and IT skills.
5. Proven ability to research, analyse and interpret complex information, maintain accurate and comprehensive case records and produce and present clear reports verbally and in writing.
6. Experience of monitoring and maintaining service delivery against agreed targets and key performance indicators
7. Ability to monitor and maintain quality standards for advice provision and quality assurance.
8. Ability and willingness to work as part of a team.
9. A commitment to continuous professional development, including a willingness to develop knowledge and skills in relevant advice topics.
10. Ability to travel to and work in outreach settings with an understanding of information assurance and safety in those settings.
11. Ability to receive feedback objectively and sensitively and a willingness to challenge constructively.
12. A proven understanding of equality and diversity and its application to the provision of advice.
13. Ability to commit to and work with the aims, principles and policies of the Citizens Advice service.

## Desirable

1. Experience within a local Citizens Advice.
2. Experience of providing digital support.
3. Achieved Citizens Advice Generalist Adviser certificate

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.

## Applying for this role

Please complete the application form **demonstrating how you meet the essential criteria listed in the person specification**. Please outline any relevant experience or examples in no more than 200 words per criteria.

### How to complete the application?

When assessing applications, we make decisions based on the quality and relevance of the examples and evidence you provide for how you meet the person specification.

See the Citizens Advice blog with some helpful tips on what we're looking for in a good application, and how we score them here - [5 tips to make your job application stand out](#).

Please also see the guidance notes for applicants.

You may wish to use the S.T.A.R. method when outlining how you meet our requirements:

- **Specific** – give a specific example
- **Task** – briefly describe the task/objective/problem
- **Action** – tell us what you did
- **Results** – describe what results were achieved



## What we give our staff

**Annual leave** - 22 days per year (from year two, increasing by one day per year to a maximum 26 days) plus bank holidays. Pro rata for part-time employees.

**Pension contributions** - Citizens Advice Taunton makes an employer contribution of 5% to the workplace pension scheme.

**A commitment to your development** - being able to achieve is important to us at Citizens Advice Taunton. Training will be provided for your current job and we will work collaboratively with you to identify your learning and development needs, and assist you to reach these goals.

**Employee assistance programme** - everyone working at Citizens Advice has immediate access to professional and completely confidential counselling and legal advisory services.