

FALKIRK CITIZENS ADVICE BUREAU

FINANCIAL HEALTH CHECK WORKER: JOB DESCRIPTION

Job Title: Financial Health Check Worker

Hours: 35 hours per week

Type of contract: Fixed term until March 2019 with possible extension (depending on funding)

Salary: circa. £22,000

Closing Date: 2 October 2018

Summary of role

The Financial Health Check Worker will play a key role in the delivery of an innovative multi-channel financial health check service in the CAB network in Scotland. This project aims to improve access to and the efficiency of financial health checks for vulnerable families and older people. The financial health check workers are the first point of contact with clients who access the service through a dedicated helpline by phone.

Main responsibilities

The Financial Health Check Worker aims to provide the most effective service to suit the needs of the client. By phone they provide a holistic diagnosis of the client's problems, helping to support the client to maximise their income and identifying whether the client is able to self-help. They refer on to their manager for emergencies or to an appropriate local CAB for a face-to-face appointment in a local bureau or other appropriate agency. On-site support and training will be provided by the CAB.

General Responsibilities

- Undertaking diagnostic interviews with clients by phone or via webchat and diagnosing whether individuals are eligible to apply for benefits or to access other income maximisation support.
- Help with resolution of straightforward enquiries
- Signposting clients who can do more to self-help
- Referring to manager for help with emergencies
- Referring to local CAB for face-to-face support with more complex issues
- Working with the CAB administrator to ensure efficient service provision
- Maintaining case records including detailed statistics
- Maintaining expertise in relevant legislation e.g. welfare rights and benefits
- Providing information for project reports
- Attending team and staff meetings as required
- Carrying out other duties as specified by the Manager and required by the needs of the post

FINANCIAL HEALTH CHECK WORKER - PERSON SPECIFICATION

FINANCIAL HEALTH CHECK WORKER	COMPETENCIES
QUALIFICATIONS	<ul style="list-style-type: none"> • Completion of accredited training to advice level (or evidence of competence through CAB ATP completion, relevant CPAG courses or Giving Good Debt Advice)
EXPERIENCE	<ul style="list-style-type: none"> • Telephone advice • Recent advice experience, welfare rights or debt counselling • Input to electronic case management systems
SKILLS AND ATTRIBUTES	<ul style="list-style-type: none"> • Ability to identify and respond to the communication needs of clients • Ability to work without close supervision, prioritise own work and meet deadlines • Ability to work as part of a team • Ability to communicate effectively, both orally and in writing • Ability to work hours flexibly as required by the needs of the service
KNOWLEDGE	<ul style="list-style-type: none"> • A sound working knowledge of social security benefits and entitlement • A knowledge of income maximisation strategies • A working knowledge of Microsoft software and related packages • An understanding of and commitment to aims, principles and policies of the service
OTHER	<ul style="list-style-type: none"> • A willingness to undertake training identified in collaboration with the Bureau Manager

If you have any questions please contact

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