 **Role profile**

**Advice giving**

Interview clients via telephone and webchat using sensitive listening and questioning skills in order to allow clients to explain their problem(s) and empower them to set their own priorities

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

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

Check client’s eligibility to apply for Universal Credit

Support clients to get everything ready to make a Universal Credit claim.

Help clients open a Universal Credit online account.

Help clients with the submission of their Universal Credit claim.

Help clients once their claim is submitted to undertake the necessary steps to get their first payment e.g. managing their UC journal.

Advise clients about interim help that is available to them whilst they wait for their first payment e.g. advance payments.

Identify other issues that clients may need help with and refer the client to an appropriate source of help whether within Citizens Advice or externally.

Work within Citizens Advice aims and principles to 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 advice, 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 telephony and IT equipment for multichannel delivery of advice services

Use 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 the 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

Abide by health and safety guidelines and share responsibility for own safety and that of colleagues