

Job Description

Trainee Money Advice Caseworker

All CASL roles are peripatetic

Role purpose

Following the successful completion of training, to provide multi-channel specialist debt and money advice to clients of Citizens Advice

Training

Consists of a mandatory 10 week training course, followed by a two week assessment, led by Money Advice Trust tutors.

Casework (following successful completion of training)

- Provide Initial check identifying urgent cases.
- Provide advice covering the full range of debt and money advice.
- Support the client to understand their rights and responsibilities in maintaining a sustainable tenancy.
- Ensure income maximisation through the take up of appropriate welfare benefits.
- Refer clients for specialist assistance to deal with their debts.
- Assist clients with other related problems where they are an integral part of their case and refer to other advisers or specialist agencies as appropriate.
- Provide advice and assistance to other staff across the whole range of debt and money advice issues.
- Ensure that all casework conforms to the Citizens Advice Office Manual and the Advice Quality Standard and/or the Specialist Quality Mark as appropriate.
- Maintain case records for the purpose of continuity of casework, information retrieval, and statistical monitoring and report preparation.
- Ensure that all work conforms to the Citizens Advice systems and procedures.

Research and Campaigns

- Assist with research and campaigns work by providing information about clients' circumstances.
- Provide statistical information on the number of clients and nature of cases and provide regular reports to Citizens Advice management.

Professional Development

- Keep up to date with legislation, case law, policies and procedures relating to debt and money advice 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/management team meetings as appropriate.
- Undergo DRO training.
- Assist with Service initiatives for the improvement of services.

Administration

- Review and make recommendations for improvements to Citizens Advice services.
- Provide detailed reports as required.
- Maintain local information systems.
- Use IT for statistical recording, record keeping and document production.
- Keep up to date with policies and procedures relevant to Citizens Advice work and undertake appropriate training.
- Attend internal and external meetings as agreed with the manager.
- Maintain close liaison with relevant external agencies.
- Maintain a library of reference material and case law.

Public Relations

- Liaise with statutory and non-statutory organisations and represent the Service on outside bodies as appropriate.

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.
- Demonstrate commitment to the aims and policies of the Citizens Advice service.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Support the management team in the delivery of the strategic aims of CASL.