

# **Money Advice Debt Caseworker**

## **Job description**

### **Role purpose**

To work as part of the Money Advice Team to provide specialist debt and money advice to clients of Citizens Advice.

### **Core Duties**

- Provide advice and casework covering the full range of debt and money issues. This may be via telephone, email or in a face to face capacity.
- Taking client instructions; this may include, but is not limited to; drafting letters/emails to the client and third parties, preparing financial statements and negotiating with third parties.
- Efficiently deal with any communication from the client and third parties
- To be willing to go the extra mile and provide the best possible outcome for clients
- To provide excellent client care and recognise the benefits of this.
- Ensure income maximisation through the take up of appropriate welfare benefits.
- Prepare and present cases to the appropriate statutory bodies, tribunals and courts as appropriate.
- To carry and manage own caseload, opening/closing cases appropriately, and carrying out reviews in accordance with MaPS guidance.
- To recognise when a client may be considered 'vulnerable' and the policy and procedures in place to provide extra support when required.
- 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.
- To work cooperatively with other staff and volunteers to provide advice and assistance 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.

- To ensure that Money Advice Services meet FCA, MaPS, and other appropriate Quality Standards
- To accurately record and work towards the achievement of agreed organisational, departmental and individual KPIs and targets
- Maintain accurate case and client records using a case management system for the purpose of continuity of casework, information retrieval, 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.
- Take responsibility for acquiring the required CPD points necessary for contract compliance.
- 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.
- Assist with Service initiatives for the improvement of services.

## **Administration**

- Review and make recommendations for improvements to Citizens Advice services.
- 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.
- An ability to establish good working relationships with colleagues and stakeholders including service users and a wide range of agencies.

## **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.
- To positively represent Citizens Advice and demonstrate commitment to the aims and policies of the Citizens Advice service.
- Abide by health and safety guidelines and share responsibility for your own safety and that of colleagues.