

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, video 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.