



# Vacancy Information Pack

**Money Advice Casework  
Assistant  
/ Trainee Money Advice  
Casework Assistant**

Dear Applicant

Thank you for expressing an interest in our vacant Money Advice Casework Assistant / Trainee Money Advice Casework Assistant post.

Citizens Advice Halton is seeking to appoint a Money Advice Casework Assistant or Trainee Money Advice Casework Assistant join the existing debt advice project team. Citizens Advice Halton has two main offices in Widnes and Runcorn. You will be required to work at both of these offices.

Please note that this post is initially funded for 9 months (to December 2022). Continuation is subject to Money and Pensions Service funding.

Before completing the application form, please make sure you fully read the following pages:

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**When assessing applications for the Money Advice Casework Assistant post will expect you to meet the Person Specification and Job Description.**

**This post is open to applicants entering at trainee level.**

This post will offer comprehensive training and support to enable the successful candidate to achieve the required competences for the role.

The deadline for submitting a completed application form and the diversity monitoring form is;

***Closing Date:***

**Please see the advert for the post**

In the first instance **all** completed application forms (**CV's will not be accepted**) should be returned to;

**Citizens Advice Halton, (Widnes Office)  
Unit 3 Victoria Building, Lugsdale Road, Widnes, WA8 6DJ  
Email: [jobs@citizensadvicehalton.org.uk](mailto:jobs@citizensadvicehalton.org.uk)**

We plan to shortlist immediately and the interview will take place within 2 weeks of the closing date. We are unable to acknowledge receipt of applications. We are unable to provide feedback on applications.

# Summary Terms and Conditions of post

|                          |   |
|--------------------------|---|
| <b>Job Title:</b>        | <b>Trainee Money Advice Casework Assistant/ Money Advice Casework Assistant</b>                       |
| <b>Reporting to:</b>     | <b>Service Manager</b>  |
| <b>Salary:</b>           | <b>£17,290 - £18,607</b> [+ up to 4% pension]<br>(Starting salary dependent on skills and experience) |
| <b>Hours of Work:</b>    | <b>35 hours per week (Full time)</b><br><b>25 days annual leave FTE + bank holidays</b>               |
| <b>Type of contract:</b> | <b>Fixed Term</b> (initially funded to December 2022)   |

## Purpose of Post

To assist in the process of Debt Casework by taking on client-facing tasks and conducting debt-based administration work.

## Duties of Post

### Casework Support

- To support any Debt Caseworker in the conduct of a client's case.
- Assist Debt Caseworker's in the management of their casework. This will include undertaking file reviews and casework administration activities.
- To conduct the analysis and assessment phase of a debt interview.
- To contact creditors to establish balances, find out information, resolve paperwork issues or to negotiate repayments.
- To contact clients and field calls from clients to explain routine situations, make or re-arrange appointments and to escalate to the Caseworker managing the case where appropriate.
- To prepare any necessary case paperwork or letters, and ensure these are correctly recorded along with key dates etc.
- To take and to input case notes on the client record system along with correct timings and diarise for follow-up.
- Ensure that all work conforms to the local Citizens Advice office systems and procedures, Money Advice Service contractual requirements, and other quality standards in place.

## **Administration:**

- To open and close cases on the case management system.
- To process Experian online requests and to liaise with clients.
- To analyse and assess creditor and client correspondence for urgency and appropriate response in conjunction with the Debt Caseworker responsible for the file.
- To accurately complete with clients, transcribe and input financial statements in line with the Standard Financial Statement (“SFS”).
- Input, access and retrieve client and case data from a range of content management systems.
- Adapt and learn new systems and products quickly and efficiently.

## **Professional development**

- Keep up to date with legislation, case law, policies and procedures relating to debt/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.
- Assist with initiatives for the improvement of services.

## **Other duties:**

- Keep up to date with Citizens Advice aims, policies and procedures and ensure these are followed.
- Ensure that work reflects and supports the Citizens Advice service's equality and diversity strategy.
- Keep up to date with social policy issues and ensure social policy is promoted and integrated in a way relevant to the role.
- Develop and maintain effective admin systems and records relevant to the role.
- Attend regular organisational and external meetings relevant to the role
- Work cooperatively with colleagues and encourage good teamwork, clear lines of communication and common practices within the local office team.
- Abide by health and safety guidelines and share responsibility for own health and safety and that of colleagues.
- Identify own learning and development needs and take steps to address these.
- Carry out any other tasks within the scope of the post to ensure the effective delivery and development of the service.

# Person Specification

## Essential Requirements:

1. Knowledge of issues effecting members of the public experiencing money problems. You should have experience supporting advice giving in a local Citizens Advice or similar advice service or customer facing setting.
2. Understanding of the need to monitor and maintain service delivery against agreed targets.
3. Effective oral and written communication skills with particular emphasis on negotiating and representing and preparing reviews, reports and correspondence.
4. Ordered approach to casework and an ability and willingness to follow and develop agreed procedures.
5. Numerate to the level required in the tasks.
6. Ability to prioritise own work, meet deadlines and manage caseload.
7. Ability to use IT in the provision of advice and the preparation of correspondence, reports and submissions.
8. Ability to commit to, and work within, the aims, principles and policies of the Citizens Advice service.
9. A good, up to date understanding of equality and diversity and its application to the provision of advice.
10. Ability to give and receive feedback objectively and sensitively and a willingness to challenge constructively.
11. Ability to monitor and maintain own standards.
12. Demonstrate understanding of social trends and public sector reform and their implications for clients and service provision.
13. Ability to demonstrate a flexible approach and willingness to work as part of a team.
14. Good customer care skills – ability to be welcoming, friendly and diplomatic in responding to client's needs and in the provision of appropriate advice.

## Desirable Requirements:

15. Completion of Citizens Advice general advice training and hold the certificate in general advice or equivalent



Halton

# Background Information

Citizens Advice Halton provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination.

## **We aim:**

- **To provide the advice people need for the problems they face**
- **To improve the policies and practices that affect people's lives**

Our advice is free, independent, impartial and confidential. The Service is non-judgmental, offering assistance as appropriate to all callers. We aim to be equally accessible to everyone who seeks or needs our help, regardless of age, race, religion, gender, HIV status, disability, sexuality or other form of discrimination. All our advice workers, whether paid or volunteer, are professionally trained to provide an accurate, quality service and to be supportive to clients.

## **How the service operates:**

Citizens Advice Halton deals with over 15,000 enquiries a year, giving detailed information, advice and support to people on every subject. The majority of problems concern welfare benefits (37%) and debt (40%), followed by employment and housing law. Citizens Advice Halton has offices in Widnes and Runcorn.

For more information about the work of the Citizens Advice service please visit the following website; [www.citizensadvice.org.uk](http://www.citizensadvice.org.uk)

# Overview of Citizens Advice

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

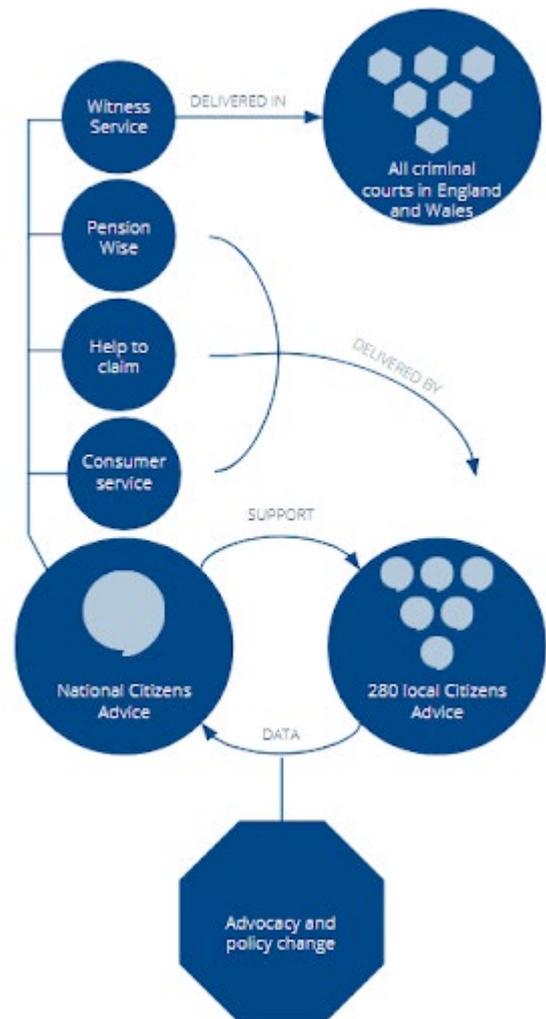
This network of independent charities, deliver services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.



## GUIDANCE NOTES FOR APPLICANTS ON COMPLETING THE APPLICATION FORM

- The form should ideally be typed (or at the very least completed in black ink or black ballpoint pen). This will make it easier for photocopying purposes. **Please do not send in your CV**, it will not be considered if you do.
- One of your referees should be your present or most recent employer. If you have not been employed or have been out of employment for a long time, please give the name of someone who knows you sufficiently well to confirm the information you have given and to comment on your ability to do the job. This should **not** be a relative or purely personal friend.
- The enclosed person specification lists the minimum requirements for this post. When shortlisting for interview the selection panel will only consider the information contained in your application form.
- The selection panel cannot make assumptions about the nature of the work you have done or your experience from a list of job titles. It is therefore important that you use the space provided to demonstrate how you meet the requirements. Paid and voluntary work are not the only experiences worth quoting. Other life experiences and skills may be just as valid.
- If you are shortlisted for interview, the selection panel will ask you questions based on the person specification and job description which will cover the areas in more detail.
- In accordance with Citizens Advice national policy, for some posts we will ask the successful candidate to be screened by the a Disclosure and Barring Service . However a criminal record will not necessarily be a bar to your being able to take up the job.
- If you have not been invited to interview within 2 weeks of the closing date you can assume that your application has not been successful on this occasion.

### **Citizens Advice Halton**

**Unit 3, Victoria Building, Lugsdale Road, Widnes, WA8 6DJ**

**Tel: 0151 257 2443**

**Email [jobs@citizensadvicehalton.org.uk](mailto:jobs@citizensadvicehalton.org.uk)**

**[www.haltoncab.org.uk](http://www.haltoncab.org.uk)**