

Job Description:	Debt Casework Administration Assistant
Person Specification:	Page 3
Hours:	30 - 37 Hours a week over 5 days
Salary:	£15,796 - £20,312 pro rata (the salary scale is dependent on experience and qualifications)
Employer's Pension Contribution:	3%
Responsible to:	Debt Caseworkers
Based at:	South Somerset Citizens Advice Offices and outposts
Job Share:	Not available

Primary Purpose

To provide administrative assistance to allocated members of the debt caseworkers team in relation to all aspects of their client work and more generally to carry out administration tasks to ensure the smooth running of their debt service. These duties must be carried out in accordance with office policy, Citizens Advice Membership standards, Money Advice and Pension Service funding requirements, and FCA (Financial Conduct Authority) requirements.

Key Tasks - Administration

1. To represent the team in a professional manner receiving telephone enquiries, emails and other communications.
2. To provide casework administrative support to the allocated team of caseworkers including:
 - Producing formal communications (letters, emails and notifications)
 - Maintaining database records, excel sheets, appointment schedules and diaries
 - Scanning documents and attaching them to clients' records
 - Assisting with postal communications
 - Checking information and ensuring that records are accurate
 - Assist with inputting information to MART (part of the debt case record)
3. To undertake statistical monitoring and reporting in accordance with the requirements of the Citizens Advice Board of Trustees and the funders.
4. To accept and record referrals to the service using internal spreadsheets and the national client data base.
5. Communicate with clients, creditors and other agencies by phone, letter and email in order to undertake tasks on behalf of caseworkers.
6. Administer clients' registrations, consent forms, case related documents and other forms and scan and store these on client records.
7. Complete delegated client closure tasks and evaluations.

Professional Development

1. Participate fully in training and on-going professional development and ensure that key dates for completing your training tasks are met.
2. Keep up to date with legislation, case law and procedures relating to Money Advice Services, Welfare Benefits and other advice issues and undertake appropriate training.

Other Duties

1. To attend and participate in team and other meetings
2. To train and support volunteers and administrative staff assisting in the Money Advice Service as directed by the Client Services Manager and in accordance with the organisation's policy and procedures
3. Abide by health and safety guidelines and share responsibility for own safety and that of colleagues
4. Demonstrate a commitment at all times to the aims, principles and policies of the Citizens Advice Service and the implementation of our equality policies.
5. Ensure the highest standard of consideration and respect to all stakeholders of the Citizens Advice Service, including clients, volunteers, colleagues and funders.
6. Liaise with other agencies as appropriate
7. Support other Citizens Advice work as requested
8. Carry out any other tasks which may be within the scope of the post to ensure the effective delivery and development of the service

Please note that this job description does not constitute a 'term and condition of employment'. It is provided only as a guide to assist an individual in the performance of the job and is not included to be an inflexible list of tasks.

Please see the person specification (page 3) which details the essential competencies that we will use for shortlisting purposes.

Shortlisting and interview selection will be conducted using information provided in the application and during the interview. The Selection Matrix Criteria indicate which of both options apply to each aspect of the Person Specification

Person Specification		Selection Matrix
1	An awareness of confidentiality and the nature of client casework	Essential Application form
2	Confident about working effectively in a busy office environment and of working to tight deadlines with accuracy and attention to detail	Essential Application form and Interview
3	Excellent interpersonal, IT, communication and customer service skills.	Essential Application form and Interview
4	High standards of numeracy and literacy and excellent administrative skills being able to work efficiently and to develop and implement administrative systems	Essential Application form
5	Ability to work effectively as part of a team and the ability to use your initiative in order to prioritise your work and the work of others, meet deadlines and ensure clients' needs are prioritised and met whilst also supporting caseworkers with their workload	Essential Application form and Interview
6	Ability to use IT systems very competently (considerable experience of using cloud-based software and other office applications and a very competent user of IT systems – including Word and Excel).	Essential Application form and Interview
7	Considerable experience of providing administrative support including record keeping (client information etc.), preparation of statistical and activity reports and other monitoring or client related documents	Essential Application form and Interview
8	A commitment to continuing professional development, primarily aimed at keeping abreast of developments that are relevant to the role	Essential Application form
9	An understanding of, and commitment to, the aims, principles and policies of the Citizens Advice service and the positive value of diversity	Desirable Application form and interview