

Issue Date: 28/02/2020**Last Review Date:** 25/02/2020**Position:** Benefit, Debt & Money Adviser**Location:** Nantgarw Head Office (Remote options available)**Hours:** 37.5 hours per week excluding breaks**Salary:** £24,000 - £26,000 Dependent on qualifications and experience

Overview

- Provide advice to beneficiaries on the full range of welfare benefit and/or debt issues;
- Deliver efficient and professional operations of the BDMA service and ensure professional upgrading is complete so that advice given is always in line with current best practice and up to date legislation;
- Work in accordance with policies and procedures, represent the first voice of the service and work to consistently achieve or exceed Service Level Agreements (SLAs), goals and objectives.

A meticulous, organised individual with excellent attention to detail who thrives from working their own case load to bring cases to resolution will thrive in this role.

You will be required to:

- Manage your own case load
- Provide sound and up to date benefit, debt and money advice
- Provide exceptional levels of service

This position will require regular travel for training and professional upgrading and there will be requirements to work outside of usual office hours as needed.

Disclaimer

This job description describes the principle and main elements of the job as it currently exists. It is not a permanent schedule and does not form part of any employee's contract of employment. Employees may be required to take on additional tasks that fall in line with the duties of their role depending on the needs of new customers, expansion of services for existing customers or changes to operational requirements within Connect Assist.

Where any changes to this job description fundamentally change the role of the Benefit, Debt & Money Adviser, they will be made in consultation with the relevant individual or group of individuals.

Main duties and responsibilities

Levels 1 & 2 (Benefit & Debt Advice)

- To provide a comprehensive community-based benefits or advice service to beneficiaries who are experiencing difficulties, advising on their legal position and all the suitable options available through a mixture of telephone and email interactions;
- Act for the customer where necessary; drafting letters, undertaking complex benefit calculations, obtaining medical evidence and researching case law as appropriate;
- Maintain detailed case records for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation, using the IT software provided;
- Ensure income maximisation through the take up of appropriate benefits and/or debt management and identifying and advising on entitlement and overlap of other benefits;
- Prepare and present cases to the appropriate statutory bodies and tribunals as appropriate;
- Manage referrals and ongoing caseload to ensure beneficiaries receive appropriate and timely support;
- Ensure beneficiaries receive a fully integrated, customer centred service which is co-ordinated with other stakeholders;
- Develop and maintain local contacts with agencies and charities associated with benefit issues. These will include advice agencies, MOD, DWP, NHS, local authorities, Service and ex-service charities;
- Provide advice, guidance, assistance and support to internal stakeholders, beneficiaries other agencies who are associated with issues connected with benefit advice;
- Liaise and work with local statutory bodies, national representatives and other organisations as appropriate;
- Develop and maintain effective working relations with volunteers, other ex-Service and charitable organisations and government agencies;
- Ability to relate to but maintain professional detachment when dealing with beneficiaries.

Level 2 only (Debt Advice)

- To provide a comprehensive community-based benefits and debt advice service to beneficiaries who are experiencing difficulties, advising on their legal position and all the suitable options available through a mixture of telephone and email interactions;
- Prepare case submissions and tribunal representation in benefit and/or debt matters;
- To keep up to date with trends and changes in social security, benefits/debt legislation and best practice, including, where appropriate, for devolved administration;
- Operate in compliance with all company policy & procedures, HR best practice and relevant regulations required e.g. PCI, GDPR, ISO 27001, 9001 and 14001.

Skills and experience

- Recognised training in advice work, e.g. Wiseradviser or Certificate in Money Advice practice;
- Accredited or Associate Membership of the Institute of Money Advisors
- Debt Relief Order Intermediary status
- Experience of managing and being accountable for own caseload
- Experience of working with IT packages, including Microsoft Office, case management systems and other bespoke software;

- Experience of preparing case submissions and tribunal representation in benefit and/or debt matters;
- Working knowledge of the military community and UK veteran organisations;
- Effective as member of a team but also able to work independently;
- Flexible and ready to adapt to changing demands;
- Empathy with mission, objectives and values for the service;
- Organised, excellent attention to detail and good problem solver.

Health and safety

Health and safety procedures must always be followed in order to control risks to self and others.

Compliance

To all Business Management Systems, including but not limited to:

- ISO 9001 Quality Management System
- ISO 14001 Environmental Management System
- ISO 27001 Security Management System
- PCI
- GDPR

1. Template Version

Issue	Date	Name	Description
1	09/12/2019	Gemma Banks	Document created

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