



FALKIRK CITIZENS ADVICE BUREAU

TRIAGE OFFICER : JOB DESCRIPTION

Job Title: Triage Officer

Hours: 35 hours per week

Fixed Term Contract: 31 March 2025

Salary: £ £23,277 per annum

Summary of role

Triage Officer will play a key role in the delivery of an independent, free, impartial and confidential advice, information and advocacy service, to Association standards. This will be done by offering a triage support service which will aim to assess client need at the earliest opportunity, effectively prioritising support and allowing more effective appointment/resource management. The type of issues that the Triage Officer will help advise and direct on include: Benefits, Income maximisation, Budgeting, Money & Debt, Housing, Relationship, Employment and Legal.

Main responsibilities

- Answer bureau advice line during opening hour and take details of client enquiries.
- Assess clients' needs and establish level of advice and support needed by using sensitive listening and questioning skills.
- Identify any emergencies and triage as appropriate ensuring the correct type and level of support required.
- Refer to Session Supervisor for help with emergencies.
- Direct clients to the most appropriate form of advice only once they have found out as much information from the client as possible for non-urgent to emergency advice.
- Provide internal and external referrals and information on advice and representation and other tackling poverty initiatives throughout Falkirk.
- To check whether individuals are eligible to apply for benefits or access other income maximisation support and arrange appointments with advisers as necessary.
- To explore clients' circumstances, support needs and access channel preferences considering language barriers, accessibility needs, and issues around digital access and ability.
- Develop and maintain knowledge in relevant legislation e.g. debt, welfare rights and benefits.
- Co-ordinates the needs of the client and liaises where appropriate with specialist bureau staff and other relevant agencies.
- Maintain accurate case records and files in both written and electronic form in line with national standards and CAS quality assurance.



- To record, update and maintain information on a case management system for the purpose of continuity of casework, information retrieval, statistical monitoring and report preparation.
- Attending team and staff meetings as required
- To work within the aims and the values of the CAB service.
- To abide by health and safety guidelines and share responsibility for own safety and that of colleagues and clients.
- Ensure that work reflects and supports the Citizens Advice service's equality and diversity values.
- Carrying out other duties as specified by the Manager and required by the needs of the post. The above job description is not exhaustive and is clarified to include broad duties inherent in the post as reasonable requested by the bureau management team.

Training

- To attend meetings and training identified by Management team.
- Monitor changes in Social Security Benefits Legislation and attend internal and external training courses as appropriate.

Administration

- Ensure all cases are recorded fully and accurately, including client financial gains in CASTLE in accordance with bureau procedures and Quality Assurance/National Standards

Quality Assurance

- To work with management team and other staff to assist in the development of Quality Assurance within the Bureau and comply with Quality Assurance /National Standards policies.



GENERALIST ADVISER PERSON SPECIFICATION

E – Essential

D – Desirable

GENERALIST ADVISER	COMPETENCIES
QUALIFICATIONS	<ul style="list-style-type: none">• Good standard of general education and relevant work experience E
SKILLS AND ATTRIBUTES	<ul style="list-style-type: none">• Good written and oral communication skills D• Understanding of the issues affecting society and their implications for clients and service provision D• Ability and willingness to work as part of a team E
VALUES AND ATTITUDES	<ul style="list-style-type: none">• Commitment to team working E• Commitment to equality of opportunity E
OTHER	<ul style="list-style-type: none">• A commitment to a client-driven, volunteer-led service and a ‘can do’ attitude E• Ability to work professionally and sensitively with all clients, volunteers, staff and key stakeholders E• An understanding and commitment to the aims, principals and policies of the CAB service E