



<b>Post title</b>	<b>Income Maximisation and Advice Officer</b>
<b>Division / Section</b>	<b>Housing &amp; Homelessness</b>
<b>Department</b>	<b>Place</b>
<b>Responsible To</b>	<b>Team Leader – Advice/ Team Leader Advice – Multidisciplinary Team</b>
<b>Number of post holders</b>	<b>18</b>
<b>Acting up/ Secondment</b>	<b>No</b>

**PURPOSE OF JOB**

To alleviate poverty and promote social inclusion by maximising the incomes and minimising the outgoings of customers. To provide information, advice, assistance, support and advocacy to households, to increase their financial wellbeing through income maximisation and reduction of outgoings.

**THE HOW - KNOWLEDGE AND SKILLS (E.G. CREATIVITY & INNOVATION, CONTACTS & RELATIONSHIPS, DECISION MAKING)**

- To provide information, advice and advocacy on Welfare Benefits and other rights to members of the public, delivering high quality advice as defined by Scottish National Standards<sup>1</sup>.
- To assess the needs and requirements of individuals and groups of your customers and gather relevant information through diagnostic interviews to complete benefit checks, assist with appropriate claims and other forms, and assist customers to access their full benefit entitlements. This will include managing a caseload to target outcomes, liaison with customers and other services, advising customers and negotiating and advocating on behalf of customers. To maintain information materials for use by customers.
- Where more specialist assistance or alternative services are required, arrange for the person to see Senior Advice Officer, Money Adviser, Consumer Adviser or other specialist advice provider as appropriate and pass details of enquiry to specialist staff and arrange administrative back up as needed.
- Liaise with external agencies to ensure enquirers claim request is dealt with, update customer on action being taken and maintain a record of progress.
- Assist customers to maximise their income but filling in application forms and follow up individual enquiries and cases through negotiation and advocacy with appropriate agencies (e.g. DWP, Social Security Scotland, HMRC and voluntary organisations and creditors) to ensure customers’ needs are fully represented.

<sup>1</sup> [Scottish National Standards for Information and Advice Providers: a quality assurance framework - gov.scot \(www.gov.scot\)](http://www.gov.scot)

- To keep accurate records of all enquiries, both by telephone and in person, casework and customer contacts using the appropriate case management system and provide analysis on the statistics regarding front line advice.
- Keep apprised of legislative and policy changes in relevant areas and ensure compliance with policy, procedure and legislation.
- The post holder must be able to take complex legislation and information and put it into a form which is easy for customers to understand, both verbally and in writing. The post holder must identify/assimilate/implement a wide range of complex and changing legislation, rules and regulations and maintain an up to date knowledge of all relevant information.
- To select, collect, organise, and maintain up to date information materials for reference and display.
- To work with staff in other disciplines, accept referrals from other agencies and organisations and provide a resource of specialised skills to assist them with the resolution of welfare rights, benefit and debt related issues.
- To participate in advice sessions in various settings in locations across the city.
- To participate and contribute to performance analysis, monitoring, evaluation, and audit tasks.
- To contribute to other tasks that may be required for the effective delivery of the service.

#### **KNOWLEDGE AND SKILLS (E.G. CREATIVITY & INNOVATION, CONTACTS & RELATIONSHIPS, DECISION MAKING)**

- Will normally be expected to be educated to HND or higher or have significant alternative demonstrable experience.
- The post holder must understand poverty issues and the ability to identify and initiate benefits applications for income maximisation.
- The post holder must respond effectively to a range of complex and sometimes emotionally distressing issues and deal with vulnerable customers from a wide variety of backgrounds and experiences.

#### **ENVIRONMENT (WORK DEMANDS, PHYSICAL DEMANDS, WORKING CONDITIONS, WORK CONTEXT)**

Duties are conducted in an office environment and in locations such as Council locality buildings, as well as working from home. There are deadlines associated with managing casework. Although the post may be exposed to some physical demands these will be predominantly within the range of normal office based activities.

#### **SUPERVISION AND MANAGEMENT OF PEOPLE (NUMBERS AND TYPE OF STAFF)**

None

#### **RESOURCES**

The post will be responsible for a range of office equipment and will update and maintain data.

#### **Health and Safety**

Protecting the health and safety and welfare of our employees, and our third parties including members of the public, contractors, service users and pupils, is the starting point for a forward-thinking Council.

All employees are responsible for:

- Taking care of their own health and safety and welfare, and that of others who may be affected by their actions or omissions;
- Co-operating with management and following instructions, safe systems and procedures;
- Reporting any hazards, damage or defects immediately to their line manager; and
- Reporting any personal injury and work related ill health, and accident or incident (including 'near misses') immediately to their line manager, and assist with any subsequent investigation, including co-operating fully with the provision of witness statements and any other evidence that may be required.

Line managers have additional responsibilities for ensuring all health and safety risks under their management are identified, assessed and controlled, with specialist input from H&S Advisers and others including Occupational Health where required. Where the risks cannot be adequately controlled the activity should not proceed.

Additional information can be found in the [Council Health and Safety Policy](#)