

# TELEPHONE ADVICELINE ASSESSOR

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**A minimum expectation of 1 or 2 days per week for approximately 6-9 months is necessary**

## **Purpose of role**

- To help provide an effective and efficient triage service to members of the public.
- To help influence government and other organisations by informing them of the effect of their actions on the lives of clients.

Advice line assessors undertake telephone assessment interviews as a means of identifying the next step that needs to be taken in the client's particular circumstances.

The role is a dynamic and focused one that requires the assessor to have key skills, for example good communication and listening skills, ability to touch type, good IT skills and the ability to think quickly and work well under pressure.

## **Key tasks**

- Explain the telephone assessment process to the client.
- Assess clients' problem(s) using sensitive listening and questioning skills.
- Identify key information about the problem including time limits, key dates and any requirement for urgent advice or action (using the Citizens Advice website, scripts and any other diagnostic tools, as necessary).
- Establish what the client wants.
- Assess the risk/urgency of the client's issue and their ability to deal with the problem themselves.
- Identify any eligibility criteria relating to the appropriate next step
- Identify and summarise the essence of the problem.
- Assess and agree the appropriate level of service, taking into consideration the client's ability to take the next step themselves, the complexity of the problem and the bureau's resources.
- Refer clients appropriately (both internally and externally) to suit clients' needs following agreed protocols, including making arrangements and informing clients of what to expect.
- Signpost clients appropriately to suit their needs following agreed protocols.
- Provide clients with discrete advice appropriate to their individual needs following agreed protocols.
- Record information and any discrete advice given during telephone assessment interviews onto Petra gateway telephone assessment screens.
- Summarize the content of the interview for the client and explain what happens next.
- Ensure clients know they can return if necessary.

## **Research and campaigns**

- Identify research and campaigns issues.
- Assist with research and campaigns work by providing information about clients' circumstances through the appropriate channel.

## Personal skills and qualities

- A commitment to the aims and principles of the Citizens Advice Enfield service.
- Sensitive listening and questioning skills
- Being open and approachable.
- Ability to communicate clearly both orally and in writing.
- Ability to quickly sift through information and extract what is relevant.
- Basic mathematical skills, including percentages.
- Respect for views, values and cultures that are different to their own.
- An understanding of why confidentiality is important.
- Competence in using IT.
- A positive attitude to self-development and assessment.
- Ability to work as part of a team.
- Ability to recognise their own limits and boundaries in the role.