

Triage Assessor

Role Description

Duties:

1. To assist Advice Session Supervisor to identify client's expectations for their visit and to supply signposting information as agreed with ASS.
2. Record Simple Query with links on Casebook.
3. If ASS assigns client to Discrete Advice (Gateway) or Detailed Advice Appointment:
 - ❖ Consult with ASS to ensure relevant issue details captured.
 - ❖ Input client profile onto Casebook. (Check is made whether client has attended previously)
 - ❖ Book appointment if appropriate/available.
 - ❖ Record Initial Exploration template and add Casebook.
4. *Assist Gateway Assessors in locating and supplying information to clients. (Using Public Site, Gov.Uk, leaflets and internet as appropriate)*
5. *To check whether Conflict of Interest has been referred to on client profile – (if so search for named party and ensure findings are made available to Gateway Assessor).*
6. *To liaise with Gateway Assessors regarding clients' follow-up requirements (ie book follow up appointments, callback slots or give follow up contact slip)*
7. *To assist with the completion of referral forms*
8. *To perform Reception Duties when appropriate, (ie welcome client and give out Gateway Assessment Notice and Client Profile. Alert appropriate adviser/caseworker/ASS if client is attending for an appointment).*

Skills Required

- Commitment to the Aims and Principles of the Citizens Advice Service
- Commitment to assist with the delivery of the Citizens Advice Service
- Basic IT skills – *including knowledge of, or willingness to train in, the use of Casebook and locating information on the public site.*
- Willingness to learn new skills.
- Willingness to research new subjects on behalf of clients.
- Commitment to working as part of the Citizens Advice Rushmoor team.