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### Overview

This standard is about being able to provide information to members of the general public on the types of welfare applications which are available in order to maximise income. The role is to provide basic information, advise customers on how to apply for assistance, assist with applications if the customer requires IT or literacy support and signpost customers to appropriate and specialist advice centres or departments.

You are likely to work in a customer service centre of a local authority or other public/third sector organisation and will be the first point of contact for customers.

The types of welfare benefits under scope in this unit includes social security benefits, housing benefits, council tax reduction schemes, tax credits, discretionary funds and local schemes for income and support in kind.

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**Performance**

**criteria**

- You must be able to:
- P1 welcome the customer using organisation's protocol
  - P2 establish their reasons for approaching your organisation
  - P3 gather relevant background information in a sensitive manner
  - P4 determine potential eligibility of benefits
  - P5 maintain customer confidentiality and privacy
  - P6 provide relevant information to the customer
  - P7 describe appropriate options for maximising income and budgeting
  - P8 explain the process for making an application including timescales
  - P9 help customer make an application should literacy and IT support be required
  - P10 inform customer that appeals can be made
  - P11 direct the customer where relevant to additional information
  - P12 signpost customer to appropriate agencies if required
  - P13 refer customer to appropriate colleagues in a professional manner
  - P14 record relevant information

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**Knowledge and understanding****You need to know and understand:**

- K1 the key principles of the current legislative framework relating to applications for benefits, grants and reliefs
- K2 the difference between
  - K2.1 means tested applications
  - K2.2 non-means tested applications
  - K2.3 tax credits
- K3 where to access information on income maximisation
- K4 the appeals procedures for challenging welfare application decisions
- K5 the potential eligibility for all benefits, grants and reliefs and how they apply to different customer groups
  - K5.1 disability
  - K5.2 age
  - K5.3 immigration status
  - K5.4 household structure
  - K5.5 housing status
- K6 the range of benefits that are currently under-claimed and why people do not claim
- K7 the agencies nationally and locally involved with the administration of welfare applications
- K8 the processes, procedures and time limits for making benefit applications
- K9 the welfare schemes locally where additional support and income can be sourced
- K10 when a customer should be referred to a specialist advisor
- K11 the procedure for referring customers to an internal advisor
- K12 to whom to refer matters that are outside your responsibility or remit
- K13 how to keep up to date with changes in relevant legislation and how this impacts on advice
- K14 organisational procedures for recording information
- K15 procedures for complying with relevant data protection legislation

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<b>Status</b>	Original
<b>Originating organisation</b>	Asset Skills
<b>Original URN</b>	WA
<b>Relevant occupations</b>	Debt/money advisors; helpline workers; housing advisors; customer service occupations; finance
<b>Suite</b>	Administration of Local Revenues and Benefits
<b>Key words</b>	Customers; support; recording; advise; information; welfare applications; local welfare schemes; income maximisation; appeals; benefits; grants; reliefs