

Job Description

Job Role: Customer Services Officer

Service: Advice & Referral Team

Role Structure	Role Details
Directorate:	Community Wellbeing
Grade:	HC5
Location:	Plough Lane
Responsible to:	Senior Practitioner/ pathway controller (for Adults Services)

Main purpose of the role

Customer Service Officers are the first point of access, assisting members of the public and professionals contacting adult social care with advice, information, signposting to community services and access to early prevention and to social work.

Customer Service Officers will have a key role in supporting callers, and people who email to access the right response to meet their presenting need, using the 'three conversations model' as it sets the tone for the rest of our services; in essence considering how we empower people with the skills and advice they need from the right service at the right time.

Customer Service Officers will work with supervision and support from senior practitioner (the pathway and referral lead) and will individually cover all the responsibilities of the role in relation to people not known currently to adult social care. Customer Service officers will gain information from the person using a strengths based approach, to appropriately meet their needs at the front door, or direct them to a range of services.

To work as part of a multi-functional team, receiving enquiries by correspondence, telephone, and digital communication; taking appropriate action to provide an efficient and effective service for the customer seeking to maximise resolution of enquiries at first point of contact.



Key Duties and Responsibilities	Frequency of Task
Initiating strength-based conversations in a professional, polite and helpful manner to resolution.	Daily.
Work in a professional manner at all times with people who may be frustrated, distressed or in pain, and sometimes they may be having communication difficulty.	Daily.
Complete screening tools on the case management system; to account for information and decision-making (mosaic).	Daily.
Complete case notes for all contacts made and received for an accurate audit trail.	Daily.
Be aware of available community services, and know how to gain information where an unusual request is made.	Daily.
Be aware of adult social care's prevention services and know their eligibility to correctly connect someone to the right service.	Daily.
Be aware of adult social care's safeguarding service and know their eligibility to correctly assign someone to the right service.	Daily.
Be are of adult social care's locality social work and occupational team and know their eligibility to correctly assign someone to the right service.	Daily.
Signposting proactively, direct customers and professionals to the most appropriate channel to meet their needs.	Daily.
Provide relevant information and advice to customers; including links to information and advice on the internet.	Daily.
Assist with adding relevant information and advice on the internet pages.	Quarterly.
Audit Performance Indicators from agreed lists using a variety of systems.	Quarterly.
Proactively develop and maintain relationships with service specialists in the community and across Council functions and departments.	Daily.



Key Duties and Responsibilities	Frequency of Task
Ensure confidentiality of information in respect of records maintained and tasks undertaken in line with agreed policy and relevant legislation.	Daily.
Any other duties that correspond reasonably to the general character of the post and are commensurate with its level of responsibility.	Daily.
Process all electronic and telephone referrals from professionals and the public, and to respond to all enquiries by telephone, letter or email.	Daily.
Identify with Pathway and Referral Lead, any pertinent safeguarding risks.	Daily.
Identify when the quality of the referral isn't acceptable and informing the referrer why it cannot be accepted.	Daily.
Searching within Mosaic and inputting referral information as well as information on changing circumstances.	Daily.
From the information gathered, decide the appropriate and proportionate pathway for progressing clients' needs.	Daily.
Reporting to the Pathway and Referral Lead.	Daily.
To advise applicable colleagues and teams of urgent requests e.g. hospital discharges.	Daily.
To contact other agencies for information and advice about services relating to individuals.	Daily.
Prioritise referrals and own workload.	Daily.
To keep up to date with relevant Legislation Policies, Guidelines and Protocols.	Daily.
To attend training courses, meetings and other events, as appropriate.	Quarterly.



Key Duties and Responsibilities	Frequency of Task
To participate in training new starters and visitors into the team.	When required.
To be able to demonstrate ability to work on own initiative, but recognise when additional guidance is required.	Daily.
To follow relevant procedures for ensuring that information and data is collected and recorded accurately thus enabling the production of reliable analysis and reporting.	Daily.
Liaising and communicating effectively with other service providers to act in the customers best interests and resolve enquiries.	Daily.
Ensure effective communication with colleagues and customers	Daily.
To access the internet and intranet for work related information	Daily.



Person Specification

Requirements	Essential or Desirable	Identified by A – Application I – Interview
Qualifications and Training		
GCSE English, grade A to C or equivalent.	Essential	A, I
knowledge of IT systems.	Essential	A, I
Experience & Knowledge		
Previous experience of working in an administrative or secretarial role	Essential	A, I
Experience of providing help to the members of the public and members of the multi-disciplinary teams	Essential	A, I
Experience of working in an office or similar environment	Essential	A, I
Experience of completing forms and writing letters.	Essential	A, I
Knowledge of a range of local authority services.	Desirable	A
Understanding of operating with confidential sensitive information.	Essential	A, I
Track record of working positively within a wider team.	Essential	A, I
Track record of resolving customer problems and handling cases to address a combination of issues	Essential	A, I
Demonstrate experience of flexible working to maintain service delivery	Essential	A, I

Requirements	Essential or Desirable	Identified by A – Application I – Interview
Skills and Abilities		
Effective customer care skills with the ability to be firm but tactful with members of the public	Essential	A, I
Must be an effective `team player` with the ability to contribute towards team working and objectives	Essential	A, I
Strong willingness to learn and adapt to new situations	Essential	A, I
Work accurately and systematically in a multi-task environment with frequent interruptions	Essential	A, I
Ability to assess customers' needs and wants by appropriate questioning and probing, including where sensitive issues are involved	Desirable	A, I
Ability to learn and apply processes	Essential	A, I
Positive approach in working with the public, other team members and colleagues within the local authority	Essential	A, I
Excellent communication skills including verbal and written	Essential	A, I
Ability to make decisions based on information received	Desirable	A, I
Awareness of equality and diversity requirements and considerations	Desirable	A, I
Adaptable to a changing environment embracing new opportunities and developments	Desirable	A, I

All council staff have a duty to promote the welfare of children, young people, and adults with care and support needs at risk of abuse and neglect who cannot take steps to protect themselves. Ensuring you attend mandated safeguarding children and safeguarding adults training to enable you to recognise the concerning behavior, know how to talk about it, and consent/duty to share information effectively. You will also learn about the legalities and procedures the social care staff can take.

Our Values and Behaviours

The council's THRIVE core values are our guiding principles and beliefs that shape our culture and behaviour within the council. They help us to achieve our Council Plan vision "do our best for Herefordshire" acting as our DNA and the "way that we do things around here". We expect all colleagues to act as a role model by living our values and setting an example for others. Our values





**Herefordshire
Council**

strive to promote a thriving workforce by fostering a culture of trust, being honest and responsible, inclusive, valuing people and resources and leading with empathy.



**Spirit of
Herefordshire**

A place to Live, Work & Thrive

Trust - Developing and maintaining relationships based on a culture of transparency and open communication. Supported by integrity and the confidence that you are reliable and fulfil commitments.

Honesty - Demonstrating truthfulness, integrity, and transparency in all communications, decisions, and relationships. Being trustworthy, reliable, and accountable for your actions. Acting with sincerity and fairness, even in challenging situations.

Responsibility - Taking ownership of individual and collective actions, decisions, and delivering on commitments. Being reliable, fulfilling obligations and being accountable for outcomes and results. Proactively contributing to the achievement of your own, the team and council goals.

Inclusivity - Embracing diversity, equity and inclusion by recognising and valuing the unique perspectives, backgrounds and experiences of our staff, customers and residents. Creating an environment where every individual is valued, respected and can belong.

Value - Upholding high standards, ethics and integrity to guide our actions and decisions. Demonstrating commitment to creating and delivering value in our work by recognising and appreciating each other, our resources, processes, customers, community and environment.

Empathy - Demonstrating a genuine and caring understanding of others' feelings, perspectives, and experiences. Listening attentively, acting with compassion, supporting with respect and kindness and considering the impact of our actions on others.

