

## **Gateway Assessor Role**

All Citizen Advice locations carry out “Gateway Assessments” as a first point of help for those who come to us for assistance. Gateway is geared towards those people with more straightforward issues or who can do a lot of the work themselves when provided with the required information.

As a Gateway Assessor your role will be to define what the client needs assistance with, and provide them with the help or information they require to move forward with resolving their problem. Gateway Assessments ‘free’ up the time of more experienced advisers and specialists to focus their efforts on assisting the less able.

**Reports to:** Session Supervisor

**Responsible for:** Providing clients with assistance, help and information to move forward with resolving their problem

### **KEY OBJECTIVES:**

1. Act as a first point of contact for the client and assist them in defining their situation and what help they may require.
2. Assess the best next steps for the client. This may include:
  - Providing them with enough information to resolve the issue themselves.
  - Referring them to external agencies with more specialist knowledge of the issue.
  - Making the client a full advice appointment.
  - Internally referring the client to Citizens Advice Colchester’s Specialist Advisors who deal with Debt, Welfare Rights, and Disability Rights.

### **MAIN DUTIES AND RESPONSIBILITIES**

1. To interview clients, both face-to-face and on the telephone, letting the client explain their enquiry and helping them to identify what action may need to be taken to begin to resolve their problem.
2. To carry out research on the Citizens Advice website to ensure advice given is referenced, up to date, and correct.
3. To complete clear and accurate case records after each session.
4. To keep up to date on important issues by attending the appropriate training and by doing essential reading.
5. To attend meetings.

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### **Person Specification**

#### **KEY SKILLS AND QUALITIES REQUIRED FOR THE ROLE**

1. Open and approachable nature
2. Computer literacy
3. Numerical skills (important for debt and benefit issues)
4. Good research skills, and the ability to retrieve information from the Citizens Advice information database and extract what is relevant for the client\*\*
5. Good oral and written skills
6. Respect for views, values and cultures that are different to their own
7. An understanding of why confidentiality is important
8. A positive attitude to self-development and assessment
9. Ability to work as part of a team
10. Ability to recognise their own limits and boundaries in the role.

\*\* (training is offered on CAB websites, databases and information systems but a good understanding and familiarity with the internet, email and word programmes is essential)