



Standard Draft Preview

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Standard in development

L4: Revenues and welfare benefits specialist

Version 2.0

Title of occupation

Revenues and welfare benefits specialist


UOS reference number

ST0602

Core and options

Yes

Standard options

Option titles

Revenues specialist

Welfare benefits specialist

Level of occupation

Level 4

Occupational maps data

Route:

Pathway:

Cluster:

Typical duration of apprenticeship

12 months

Resubmission

No

Would your proposed apprenticeship standard replace and existing framework?

No

Does professional recognition exist for the occupation?

No

Regulated occupation

Is this a statutory regulated occupation?

No

Occupational summary

This occupation is found in local authorities, revenue and benefits services, housing services, advice organisations, and a range of public- and community-based settings that support residents and businesses.

The broad purpose of the occupation is to ensure customers are correctly assessed for local taxation liabilities, benefits, and reductions, and to manage accurate billing, payment arrangements, and recovery actions in line with legislation and organisational policies.

Revenues roles ensure that taxpayers for council tax and non-domestic rates are billed, collected, and administered accurately, providing clear information and support to residents, businesses, and other stakeholders.

Welfare Benefits roles provide specialist advice or assessment, and support to individuals and families to help them access welfare benefits, financial assistance, and support services to which they are entitled.

In their daily work an employee in this occupation interacts with members of the public, businesses, colleagues within their organisation, and external stakeholders such as enforcement agents, welfare support agencies, debt advice services, services that support local taxation or welfare provision and government departments. Communication may occur face-to-face, by phone, or through digital channels.

Revenues Specialist

An employee in this occupation will be responsible for the assessment, collection, and enforcement of local taxation and associated charges, ensuring compliance with relevant legislation and maintaining accurate records.

Welfare Benefits Specialist

An employee in this occupation will be responsible for providing support, guidance, and assistance to individuals or groups, assessing needs, administering welfare services or benefits, where appropriate, and promoting financial wellbeing in accordance with relevant policies and legislation.

Typical job titles

Benefits advisor

Benefits assessor

Benefits officer

Business rates officer

Council tax officer

Revenues and benefits officer

Welfare officer

Welfare support worker/advisors

Are there any statutory / regulatory or other typical entry requirements?

No

Core occupation duties

DUTY	KSBS
<p>Duty 1 Consider statutory and non-statutory frameworks and legislation and apply these as appropriate for the organisation and sector.</p>	<p>K1 K8 K11 K16 K17 K18 S13 S14 S15 S16 B2 B8</p>
<p>Duty 2 Engage with customers, stakeholders and service users through appropriate communication, for example, face to face, digital channels or phone.</p>	<p>K3 K4 K5 K6 K12 K19 K20 S1 S2 S13 B2 B6</p>
<p>Duty 3 Provide accurate information to address and resolve customer enquiries considering their specific needs in a timely and concise manner.</p>	<p>K1 K2 K3 K4 K5 K6 K7 K8 K10 K11 K19 S1 S3 S4 B4</p>
<p>Duty 4 Access and update relevant information systems accurately and appropriately, taking account of confidentiality, reputational risks and data security.</p>	<p>K11 K19 K20 S8 S15 B4</p>
<p>Duty 5 Support the continuous improvement of service delivery using best practice.</p>	<p>K13 K14 K15 K18 S10 S11 S16 B3 B6</p>
<p>Duty 6 Identify opportunities to assist the customer with income maximisation, welfare support or budgeting, whether personal or business related, signposting where appropriate.</p>	<p>K1 K2 K4 K7 S3 B6</p>
<p>Duty 7 Effectively navigate and manage challenging or sensitive communications using skills such as active listening, empathy, and clear communication.</p>	<p>K3 K4 K5 K6 S2 S13 B2 B6</p>

Duty 8 Proactively seek support, feedback, or guidance from colleagues or supervisors when necessary to deal with customer enquiries.	K9 K12 S5 B1 B3
Duty 9 Take ownership of complex and challenging issues, making timely and well-informed decisions in accordance with statutory and non-statutory frameworks and legislation.	K1 K2 K4 K8 K10 S7 B1 B5 B8
Duty 10 Demonstrate personal and professional growth by proactively identifying and undertaking development opportunities that align with agreed objectives.	K13 K15 S10 S11 S12 B1 B6
Duty 11 Apply professional analysis to identify and evaluate missing, inaccurate or incomplete information.	K10 S6 S15 B8
Duty 12 Obtain evidence from appropriate sources, evaluating its validity and relevance and making decisions based on it.	K10 S7 S15 B4 B8
Duty 13 Build and maintain strong stakeholder relationships, including other departments within the organisation and external contacts where appropriate.	K5 K7 K9 K11 K12 K16 S3 S5 S9 B2 B3 B7
Duty 14 Notify customers of how they can dispute or appeal decisions as appropriate.	K8 K11 S4
Duty 15 Support your team by sharing information and offering support to others.	K5 K9 K14 K15 K16 S11 B3 B5 B7

Option occupation duties

Revenues specialist duties

DUTY	KSBS
Duty 16 Establish the correct start and end of liability for taxation in line with legislation.	K21 K22 S17
Duty 17 Establish eligibility for reductions or liability to additional charges in local taxation in line with legislation and policies.	K21 K22 K23 K24 S18
Duty 18 Negotiate and arrange payments and payment plans in line with legislation and procedures.	K23 K24 K25 K26 S20 S21
Duty 19 Take appropriate action in relation to collection, recovery and enforcement in line with legislation, policies and procedures.	K24 K26 S22

Welfare benefits specialist duties

DUTY	KSBS
Duty 20 Assist customers with identifying and accessing financial support (such as national and local benefits, credits or reductions) and calculate entitlement.	K27 K28 K29 K30 K31 S23 S25 S26 S27
Duty 21 Take appropriate action to ensure changes to entitlement are dealt with in line with legislation and within their area of responsibility.	K27 K29 K30 K31 K32 S19 S23 S24 S25 S26 S27 S28
Duty 22 Ensure entitlement has been applied correctly in line with legislation and procedures and within their area of responsibility.	K28 K29 K30 K31 K32 K33 S19 S24 S25 S26 S27 S28 S29
Duty 23 Check overpayments and explain these to customers in line with legislation, policies and procedures.	K34 S30

KSBs

Knowledge

K1: Principles of local taxation, including liability, discounts or reliefs, and exemptions.

K2: Types of available benefits, credits and reductions.

K3: Types of customers and their needs.

K4: Indications of customer vulnerability and methods to support vulnerable customers.

K5: Communication tools and methods, including digital, verbal and written.

K6: Techniques to manage challenging or sensitive communications for example active listening, empathy, and de-escalation.

K7: Support available for budgeting, debt or other welfare issues.

K8: Legislation, policies and procedures on rights of dispute or appeal against decisions.

K9: Sources of support, feedback or guidance available to individuals within the organisation.

K10: Methods of obtaining, analysing and validating information and evidence required to support decision making.

K11: Methods to use, record and store personal data securely and in line with relevant data protection requirements.

K12: Key internal and external stakeholders and methods of building and maintaining relationships.

K13: Key performance indicators and own responsibility for contributing to them.

K14: Organisational procedures for service improvement.

K15: Professional development available to align with agreed objectives.

K16: Benefits and value of a diverse and inclusive environment and how legislation and organisational policies support this.

K17: Health and safety legislation and policies relevant to role.

K18: Approaches to sustainability and the efficient use of resources.

K19: Digital applications, tools and systems relevant to role, including the safe use of technology.

K20: The capabilities and benefits, limitations and risks of using AI and digital tools within the role, including organisational policy for appropriate use.

K21: Requirements relating to valuation lists, including relevant legislation, policies, and procedures.

K22: Principles governing liability for local taxation, for example the hierarchy of liability, and associated legislation, policies, and procedures.

K23: Local taxation exemptions, discounts, and reliefs, including applicable legislation, policies, and procedures.

K24: Regulations on additional local taxation charges, including property premiums and court costs, and relevant policies and procedures.

K25: Methods and frequency of local taxation payments, including relevant legislation and procedural guidance.

K26: Processes for local taxation billing, reminders, summons, recovery, and enforcement, including associated legislation and policies.

K27: Eligibility conditions for benefits or reductions, including exclusions from entitlement and claim requirements, as set out in legislation, policies and procedures.

K28: Methods for calculating and commencing benefits or reductions in line with applicable legislation, policies and procedures.

K29: Rules for assessing income and capital within benefit or reduction calculations, as specified in legislation, policies and procedures.

K30: Impact of other household members on the calculation of benefits or reductions, in accordance with legislation, policies and procedures.

K31: Treatment of rent or council tax within benefit or reduction calculations, based on relevant legislation, policies and procedures.

K32: Principles and rules governing effective dates for changes in circumstances and how these affect benefit or reduction calculations, as detailed in legislation, policies and procedures.

K33: Requirements for ensuring entitlement is paid to the correct person using the appropriate method and frequency, in line with legislation, policies and procedures.

K34: Principles for managing overpayments, including determining recoverability, choosing appropriate recovery methods and identifying the correct liable party, as governed by legislation, policies and procedures.

Skills

S1: Provide information to customers using a range of communication tools and methods.

S2: Navigate and manage challenging or sensitive communications.

S3: Assist customers with income maximisation, welfare support or budgeting, by signposting or referral.

- S4:** Notify customers of how they can dispute or appeal decisions as appropriate.
- S5:** Proactively seek support, feedback, or guidance from colleagues or supervisors where appropriate.
- S6:** Determine missing, inaccurate or incomplete information and evidence.
- S7:** Obtain, analyse and validate information and evidence from appropriate sources to support decision making.
- S8:** Utilise relevant information systems accurately and appropriately, taking account of confidentiality, reputational risks and data security.
- S9:** Manage internal or external stakeholder relationships
- S10:** Contribute to the achievement of key performance indicators.
- S11:** Contribute to service improvement.
- S12:** Proactively identify and undertake professional development that aligns with agreed objectives.
- S13:** Comply with equality, diversity and inclusion rules and procedures.
- S14:** Comply with health and safety requirements in work environment.
- S15:** Select and appropriately use organisationally relevant digital applications, tools or systems to complete tasks.
- S16:** Support sustainable methods of working and consider the environmental impact of actions.
- S17:** Determine local taxation liabilities.
- S18:** Determine and apply local taxation discounts, exemptions or reliefs.
- S19:** Establish local taxation additional charges or costs, either applying or withdrawing them.
- S20:** Arrange local taxation payment methods and frequencies.
- S21:** Negotiate payment arrangements.
- S22:** Take actions to recover or enforce debt.
- S23:** Establish whether customers are eligible for a benefit or reduction and inform them of the decision.
- S24:** Establish the commencement date for a benefit or reduction.
- S25:** Assess the impact of income and capital on the calculation of benefits or reductions.
- S26:** Evaluate the impact of household members on the calculation of benefits or reductions.
- S27:** Determine how rent or Council Tax affect the calculation of benefits or reductions.

S28: Assess the impact of changes in circumstances on benefit entitlements or reductions.

S29: Determine correct payment or transfer of entitlement to benefits or reductions.

S30: Take action on overpaid benefits or reductions.

Behaviours

B1: Take responsibility for actions, including acknowledging mistakes and taking steps to correct them.

B2: Act with honesty, integrity, professionalism, and impartiality, treating colleagues, service users, and stakeholders fairly and with respect.

B3: Work collaboratively with others, sharing knowledge and contributing positively to team outcomes.

B4: Deliver work efficiently and at pace, managing time effectively to meet expectations while maintaining accuracy and reliability.

B5: Demonstrate dependability, meeting commitments such as attendance, punctuality, and completing assigned tasks.

B6: Show flexibility and resilience, remaining calm and patient in challenging situations and adapting positively to change.

B7: Support an inclusive and respectful environment, valuing different perspectives and encouraging understanding among colleagues and stakeholders.

B8: Apply professional scepticism, recognising potential misuse of systems and verifying information appropriately.

Qualifications

English and maths

English and maths qualifications must be completed in line with the apprenticeship funding rules.

Does the apprenticeship need to include any mandated qualifications in addition to the above-mentioned English and maths qualifications?

No

Consultation

Progression routes

Supporting uploads

Mandatory qualification uploads

Mandated degree evidence uploads

Professional body confirmation uploads

Subject sector area

1.4 Public services