



Citizens Advice Taunton  
St Mary's House  
Magdalene Street  
Taunton, TA1 1SB

[tauntoncab.org.uk](http://tauntoncab.org.uk)

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Office Administrator

Role Description & Person Specification (April 2018)

## Reporting to

A designated member of the Management Team

## Context

As a service which deals with so many clients, we need a dedicated administrative resource in order to maximise the time our advisors have for seeing clients, and to ensure the smooth running of the office. This role would suit candidates who enjoy operating and improving systems, and who enjoy being part of a central function that interacts with all areas of the organisation and the people in them.

## Role Description

### Main tasks

- Incoming and outgoing post
- Transferring case notes to Casebook following system failures
- Deleting duplicated client records
- Archiving of closed files
- Scanning client paperwork into our client database
- Updating advisor resources
- Assisting with the administration of the Local Assistance Scheme
- Pro-actively identifying administrative improvements to our systems

### Other tasks

- Complete the required training, and participate in meetings and reviews as appropriate
- Carry out any other tasks that may be within the scope of the post
- Uphold the aims and principles of the CA service and its equal opportunities policies
- Keep to our health and safety guidelines, and share responsibility for own safety and that of others

## Person specification

- Availability for a minimum of ½ day per week
- Reflect and support CA-T's confidentiality policy, and equality and diversity principles
- Follow the office's systems and procedures
- Able to use IT systems and packages, and proficiency with the Microsoft Office suite
- Able to give and receive feedback objectively and sensitively and a willingness to challenge constructively
- Good communication skills
- Able to monitor and maintain own standards
- A willingness to attend training and other meetings
- To be approachable and friendly
- Able to work on own initiative, in a methodical and reliable way
- Able and willing to work as part of a team