

**Citizens Advice Taunton**  
**Receptionist/Administrator**  
**Job Description & Personal**  
**Specification**



**Responsible to:**

Advice & Operations Manager for Reception;  
Administration & Management Information Manager for Administration

**Lead Manager:** Advice & Operations Manager

**Purposes of Role:** To welcome clients, provide information and ensure they are dealt with according to Citizens Advice Taunton (CA-Taunton) systems.

To help the organisation run as smoothly as possible by carrying out administrative tasks for other volunteers and paid CA-Taunton staff.

Working within the aims, principles and policies of the Citizens Advice Service:

- to provide the advice people need for the problems they face;
- to improve the policies and practices that affect people's lives.

The Receptionist/Administrator is a member of a team of voluntary and paid CA-Taunton staff who provide a free, confidential, impartial and independent service to the public.

**Key Reception work areas and tasks:**

- Operate the reception and provide information.
- Welcome clients and visitors both face-to-face and on the telephone.
- Explain waiting times and procedures to clients.
- Provide information about the Citizens Advice and other advice services to clients from a diverse range of backgrounds and cultures.

- Work collaboratively with other colleagues.
- Provide a service that is based on sensitivity and respect for clients.
- Acknowledge children and/or any special needs and take appropriate action.
- Maintain confidentiality about clients and their contact with CA-Taunton.
- Liaise with the Advice Session Supervisor.
- Work within agreed CA-Taunton systems and procedures.
- Answer the telephone and refer calls or take messages.
- Process client information collected at the reception helpdesk.
- Provide client with information where appropriate, including details of other agencies.
- Update client records on Citizen Advice systems.
- Liaise with advice staff regarding support for individual clients.
- Maintain a record of waiting times and any other key statistics.

### **Key Administration work areas and tasks:**

- Process and distribute all post in, including scanning and attaching all post relating to clients to their records on the Citizens Advice case management system.
- Stamp and post all post out.
- Process all scanning requests.
- Process admin requests submitted using an Admin Request Form.
- Help to ensure that cases are closed at the appropriate time.
- Archive any client papers that have not been scanned and attached and maintain existing archives.
- Produce statistical reports from the Citizens Advice case management system.
- Pick up telephone messages and pass them on appropriately.
- Ensure that there are adequate supplies of refreshments for workers.
- Help other workers to use office equipment if they are experiencing difficulties.

There are other administration tasks which are allocated to particular individuals and not listed above.

### **Research and Campaigns**

Contribute to CA Taunton's work of exercising a responsible influence on policies, both local and national, which affects the lives of clients by:

- Identifying social policy issues.
- Participating in local and national social policy campaigns.

## **Equality and Diversity**

Provide an impartial and non-judgemental service to all clients:

- Identifying possible breaches of Equality legislation, policy and practice.
- Taking part in Research and Campaigns exercises focused on Equality and Diversity.
- Challenging behaviour which indicates discrimination.
- Assisting CA-Taunton in making the service accessible to all clients irrespective of any factor such as race, gender, sexual orientation or disability.

## **Training and development**

- Keep up to date with information resources, legislation, policies and procedures and undertake appropriate training.
- Assess own practice to identify own training and development needs.
- Learn through training and reflect on practice.
- Keep informed about the local community, local and national issues, developments and changes.

## **Development of the Service**

Contribute to the development of the team by

- Participating in staff meetings.
- Contributing to the discussions about the overall planning and policy of the service, both nationally and locally.

## **Personal Skills and qualities that a Receptionist/Administrator needs:**

- Friendliness and approachability.
- Commitment to the Aims and Principles of the Citizens Advice service including the service's equality and diversity policies.
- An understanding of discrimination.
- Excellent verbal communication skills including telephone skills.
- Good numeracy and literacy skills.
- Ability to access relevant signposting information including electronic and written materials.
- Ability to implement administrative policies and procedures in a busy work environment.
- Good IT skills, including Word, Excel, Outlook, email and internet.
- Flexibility and willingness to work as part of a team.
- Awareness of the potential needs of, and demands placed on,

vulnerable clients.

- Attention to detail and the ability to work in a fast-paced environment.