

Receptionist, Admin & Initial Assessor Job description & Personal Specification

Reporting to: Office Manager

Purpose of role: To be responsible for the day-to-day delivery of reception services at Citizens Advice North Somerset offices and advice centres and provide administrative support to the Office Manager & Advice Service Manager (Generalist Service) specifically and all other departments as required.

You will have a high level of computer, written and verbal communication skills: you will be required to communicate clearly, assertively and sensitively with people from a wide range of backgrounds. An organised and flexible approach is essential for this very busy role.

About Citizens Advice North Somerset: We provide a range of advice services through digital means, by telephone and in person. We seek to empower our clients and support them to improve their confidence and capability on a wide range of issues.

We aim to improve the health and wellbeing of everyone living or working in North Somerset who needs our help and support, by providing accessible, effective and tailored information and advice that is free, independent, confidential and impartial.

We believe that our common humanity makes us equal in worth, dignity and rights. We value diversity, promote equality and challenge discrimination.

Main duties and Responsibilities

Reception

- Ensure reception areas are presented to a high standard.
- Provide a professional and welcoming greeting for all staff, clients & visitors to ensure they have a positive experience acknowledging and taking appropriate action to any children or special needs visitors.
- Provide a prompt, courteous and professional greeting to all telephone callers, signposting appropriately, collecting all relevant information for referral to the Advice Services manager (generalist) and/or passing to relevant adviser/caseworker.
- Oversea coordination of clients and visitors to the building ensuring correct procedures for access are followed.
- To manage booking of interview rooms, desk space & the conference room.
- Support clients to obtain all relevant information and paperwork to enable them to engage and progress with advice.
- Provide information about the organisation to clients from a diverse range of backgrounds and cultures, where appropriate details of other agencies, point out leaflets / factsheets from Advice guide and other sources.
- Work collaboratively with other colleagues and strive to provide a service that is based on sensitivity and respect for clients.

- Obtain and accurately record client consents & personal details and all other relevant information on the Citizens Advice case recording system.
- Liaise with the Advice Session Supervisor to support the client journey to receiving face to face advice in a confidential and timely manner.
- Liaise with and support caseworkers about client cases and the best course of action to take.
- Ensure that all client contact is undertaken in accordance with advice quality and membership standards and in accordance with internal policies and procedures.
- Signpost or refer clients to other services and organisations as appropriate.
- Maintain complaints procedures in accordance with Citizens Advice and FCA guidelines.
- Ensure Health & Safety requirements with regard to testing the fire alarm and conducting emergency evacuations exercises are adhered to.

Initial Client Contact

- In a triage system, ensure clients are correctly directed and support them to complete registration forms.
- Support first line assessor to conduct a 'light touch' initial check and complete data entries on a case recording system.
- Using sensitive listening and questioning skills, support clients from a diverse range of backgrounds and cultures, to obtain all relevant information to enable them to engage and progress with advice services appropriately.
- Provide information about the organisation to clients and where suitable, details of other agencies, point out leaflets / factsheets from Advice guide and other sources;
- Maintain case records for retrieval of information, monitoring and report preparation
- Ensure that all work conforms to our organisation's systems and procedures

Administration

- Use of telephony, emails and IT equipment for multichannel delivery of advice services.
- Create, maintain and archive paper and electronic filing systems in accordance with the organisation's systems and procedures.
- To support the administration of the regular ordering of stationery and office provisions.
- Manage the incoming and outgoing post.
- Liaise with Finance & Resources manager re building management and facilities. This includes assisting with couriers and deliveries, arranging maintenance visits and researching and obtaining quotes for building works as they arise.
- Provide administrative support as required, including: accurately recording initial paperwork, preparing correspondence, photocopying, scanning and booking appointments;
- Ensure that all work conforms to our organisation's systems and procedures
- Support the Office Manager with other ad-hoc administrative tasks as requested and in keeping with the role.

Professional learning and development

- Keeping up to date with legislation, policies and procedures and undertake appropriate training;
- Attending internal and external training;
- Prepare for and attend team meetings/staff meetings as appropriate;
- Ensure GDPR compliance training is completed on an annual basis and keep up to date with all other training as required via Skillbook (internal training mechanism)

Other duties and responsibilities

- Demonstrate commitment to the aims and policies of Citizens Advice;
- Contribute to a positive working environment in which equity and diversity are well managed, dignity at work is upheld and staff (paid and volunteer) can do their best.
- Abide by health and safety guidelines and share responsibility for own safety and that of colleagues.
- Work co-operatively with other staff (paid and volunteer) to develop good relationships and raise awareness of the advice service.

Person specification

		Essential	Desirable
1.	Previous experience of working in a reception or customer service facing role. They will be experienced in working with a diverse range of people and provide a welcoming environment for clients.	✓	
2.	Excellent verbal communication skills both face to face and via telephone with the ability to support clients and obtain relevant information and paperwork to enable them to engage and progress with advice services.	✓	
3.	High level of written communication skills.	✓	
4.	Ability to implement administrative procedures in a busy work environment whilst making full use of IT systems, packages and electronic resources.	✓	
5.	Proven ability to organise, prioritise, work under pressure and multi-task a varied workload with minimal supervision.	✓	
6.	IT proficient with the ability to use Word, Excel, email and maintain electronic diaries, together with a willingness to use other applications with relevant training as required.	✓	
7.	Ability and willingness to work as part of a team, to contribute to the wider organisational goals and to help develop volunteers.	✓	
8.	A commitment to continuous professional development, including willingness to develop knowledge and skills in advice topics;	✓	
9.	Understanding and commitment to the aims and principles of Citizens Advice service and its equal opportunities policies.	✓	
10.	Experience of following set procedures and amending procedures to improve processes and running of a busy reception.		✓

