

# Client Services Team Member - Receptionist

## Job Description

**Location:** Morecambe Office, 87-89 Queen Street, Morecambe, LA4 5EN

1. **Reporting to:** Client Services Team Leader
2. **Reporting to the Receptionist:** N/A
3. **Salary:** £28,111 FTE (£9,305.71 actual)
4. **Main Purpose of the Job:**
  - a. To provide a warm and welcoming reception to all our clients when they come to us for help during our drop-in sessions
  - b. To provide an efficient and effective administration support system to both paid staff and volunteers
  - c. To triage clients as appropriate offering support, understanding and empathy to all accessing Citizens Advice North Lancashire

### Main Duties & Responsibilities

#### Reception

- First point of contact for all clients accessing CANL via our reception area offering a welcoming, non judgemental and professional approach
- Triage as appropriate and provide information regarding the various different options for accessing advice from CANL
- Provide general information about the service as requested
- Prioritise if you feel a client may be in crisis or a matter may be urgent and if required seek support from the daily duty person
- Register clients on the national Citizens Advice electronic record keeping system, Casebook

- Provide support to the Advice Navigators dealing with 'drop in' clients

### **General Administration (when not doing reception)**

- You will be expected to time manage and prioritise your workload as appropriate in what is a very busy and fast paced organisation. Enquiries are received via telephone, email, face to face and answer machine messages
- Following set procedures register all client enquiries on the national Citizens Advice electronic record keeping system, Casebook
- Maintaining confidentiality and complying with all national GDPR requirements, liaise with advisers and relay information relating to ongoing and new cases as required
- Process food parcel and fuel voucher requests as appropriate
- Open, record, scan and distribute incoming post
- Proofread, print and post outgoing mail and record as necessary ready for dispatch
- Ensure all incoming client documentation is scanned and added to their electronic data record and the relevant caseworker is notified
- Process incoming referrals to the service, registering clients on our electronic client database and following set procedures
- Book appointments using our in-house electronic system ensuring the client receives a text message with the relevant details
- Provide help, training and support to our volunteer advisers as needed
- Maintain and work with all our administrative systems and procedures to ensure efficient working and compliance with Citizens Advice quality standards, our various funders, including the Money & Pensions Advice Service, Community Fund and our core funder, Lancaster City Council
- Any other administration tasks as requested by the Client Services Team Leader or Senior Management Team at Citizens Advice North Lancashire

### **Other Duties & Responsibilities**

- To regularly identify your own training needs and undertake training as appropriate
- Carry out any other tasks that may be within the scope of the post to ensure the effective delivery and development of the service
- Ensure compliance with Citizens Advice Equality and Diversity policies
- Abide by Health and Safety guidelines and share responsibility for own safety and that of colleagues and volunteers

**Note:** *This job description does not constitute a 'term and condition of employment' and does not form part of the employment contract. It is provided only as a guide to assist the employee in the performance of their job. It is not intended to be an inflexible list of tasks and may be varied from time to time, in line with business objectives and service needs, after consultation and discussion with the post holder, in accordance with current policy and practice.*

# Person Specification

We work in a really special charity - one with a warm, positive and non-judgemental culture where everyone is welcome. If you want to work at Citizens Advice North Lancashire we want to make sure you are keen to join us, our team, and contribute to our positive ethos. We don't mind if you don't have lots of experience but we do want you to be willing to learn. We will provide full training and support to you if you join us.

We'll be looking for someone who is:

- Enthusiastic and positive
- Punctual, with good time keeping and excellent attendance
- A clean, tidy, professional appearance
- Confident with computers and phones and in time, able to support volunteers who are less confident
- A patient person who is also calm under pressure
- Someone who really likes meeting a huge range of different people
- Someone who is understanding and empathetic about people's issues, especially when they are upset or very vulnerable
- Not afraid to ask for help
- Keen to learn lots of different things including how to deal with different people from different backgrounds, all with varying life circumstances
- Happy in a busy environment with lots of people coming in and out
- Good under pressure
- Happy to flex and change depending what's needed that day
- Good at working with a team
- Non judgemental, with an understanding about Equity, Diversity and Inclusion
- Good on the phone, face to face and confident using email
- Good literacy and grammar standards with attention to detail
- Someone who is willing to get stuck in and do their best for our clients
- Someone who is interested in our service and what we do