

Advice, Information & Helpline Officer - Job Description

Internal job title: Triage & Information Officer

Role Overview

As the first point of contact for carers, professionals, and partners, the Triage and Information Officer will be responsible for making swift, initial assessments to determine the urgency and nature of a need. This role involves providing immediate information, signposting to appropriate services, and making internal referrals to the relevant teams as appropriate. The Officer will ensure all carer records are accurately updated, with the aim of resolving carer enquiries with an empathetic and professional manner.

Key Information

Post:	Triage & Information Officer
Pay Banding:	Band C: £28,444 - £30,154 (Full Time Equivalent)
Hours & Location:	36 hours per week. Astolat, Burpham (office) – with opportunity for Hybrid working, The post requires a flexible approach to working hours, including evening and weekend work. At present, this typically involves one evening per week and one Saturday morning per month; however, these requirements may vary to meet the changing needs of carers and the organisation.
Responsible to:	Triage & Information Manager

Key Responsibilities

Helpline & First Contact Support

- Act as the first point of contact for incoming enquiries and referrals via phone, email, and other channels, responding with empathy and professionalism.
- Register and welcome new carers, ensuring they receive a positive and supportive introduction to the organisation.
- Provide accurate information, guidance, and signposting to appropriate services and support.

Triage, Assessment & Safeguarding

- Conduct timely initial assessments to determine the nature, urgency, and level of support required.
- Identify immediate risks, safeguarding concerns, or other issues requiring urgent intervention and escalate appropriately.
- Refer or escalate enquiries to relevant internal teams and external services where appropriate to ensure carers receive the right support.

Information Management & Administration

- Maintain accurate and up-to-date records of all interactions with carers using the organisation's CRM system and Microsoft applications.
- Ensure all correspondence, assessments, referrals, and outcomes are recorded in a timely, consistent, and confidential manner.

Service Development & Organisational Contribution

- Support organisational events, awareness activities, and cross-team projects as required.
- Attend community and partnership events to develop knowledge of available services and strengthen understanding of carers' needs.
- Promote the charity's services effectively to encourage engagement and access to support.

Professional Development & Continuous Improvement

- Take ownership of your individual performance, training, and professional development.
- Maintain and develop the knowledge, skills, and understanding required to deliver a high-quality information, advice, and triage service.
- Contribute to a culture of continuous improvement, collaboration, and excellence across the organisation.

Person Specification

Essential Experience

- Proven experience in a customer service or information provision role, ideally in a setting requiring sensitivity and professionalism.
- Experience using CRM systems / databases to provide timely customer support.

Essential Knowledge

- A strong understanding of safeguarding principles and procedures, and how to apply them in practice.
- Awareness of how to handle sensitive information and maintain confidentiality.
- A sound understanding of how to assess and respond to individuals in potentially vulnerable situations.

Essential Skills

- Strong IT skills, including proficiency with databases or CRM systems, and standard office software.
- Excellent communication and active listening skills, with the ability to engage effectively and empathetically.
- Ability to quickly assess situations, identify key information, and make informed decisions.
- A calm, professional, and empathetic telephone manner, especially when supporting individuals in distress.
- Willingness to undertake and achieve L2 accredited training in Information, Advice and Guidance (IAG).

Desirable

- Level 3 in IAG or Customer Service
- Experience working in advice and guidance or triage settings.
- Knowledge of the challenges faced by unpaid carers, including emotional and practical impacts.
- Experience in the health, social care, or voluntary sector, with an understanding of referral pathways and support networks.