



Administrative Assistant Role Definition

Principal Responsibility: The Administrative Assistant has the primary responsibility of managing first impressions for the company, handling calls in a professional and effective manner and maintaining common areas. This person is responsible for the client's experience of confident and competent handling of documents and files.

Position is: Hourly, Non-Exempt, Full-Time

Position reports to: Administrator

Position supports: Administrator, Staff Supervisor, Marketing Director

Accountable For:

1. Handling all front desk phones, traffic and office appearance.
2. Setting up client files in accordance with established procedures
3. Routing all calls accurately to the appropriate staff person
4. Tracking office supplies for re-ordering.

Within budget limits, the Receptionist/Scheduling Assistant has the authority to:

1. Provide reassurance necessary to achieve customer satisfaction, offering follow up by senior staff to alleviate client concerns

General Standards

1. All client materials and information will be held as *strictly confidential* outside the company. The information included in the operations manual is proprietary.
2. Provide notes and messages for all telephone calls or in person inquiries to the appropriate staff person within the hour.
3. Employees will provide staff assistance as requested, with a spirit of helpfulness.
4. Employees are encouraged to recommend ideas for the betterment of the company, innovations and improvements within their department and position.
5. All work product published to a client or regulatory agency will be reviewed prior to distribution outside the firm.

Administrative Assistant

Date

Name (please print)

Administrator

Date

Name (please print)