

## Position Description - Finance and Claims Manager

<b>Position Title:</b>	<b>Finance and Claims Manager</b>
<b>Work Location:</b>	
<b>Employment Conditions:</b>	Permanent/ Casual/ Short Term/ contract
<b>Award Classification:</b>	Social, Community, Home Care and Disability Services Industry Award 2010 <i>Headway Gippsland proudly pay above Award conditions</i>
<b>Tenure:</b>	Short Term Contract Length / Delete
<b>Position Reports To:</b>	CEO

### About Headway Gippsland

Headway Gippsland Inc. is a not-for-profit organisation operating in Gippsland, Victoria and has been providing services to those with acquired brain injuries since 1981.

The provision of disability services is undergoing major reform and to ensure that Headway Gippsland Inc. can continue to be a leading provider, we now provide services to persons with disabilities of all ages. With offices based in Morwell, Drouin and Newborough, we have staff operating across the region. Headway is registered with the Australian Charities and Not-for-profits Commission.

### Our Workplace

Our mission is to provide exceptional services to individuals with an acquired brain injury (ABI) and other disabilities and their carers, in order to participate in all aspects of community life. Ours is a vision of a society that is inclusive of all.

Our people are our priority and our proudest strength as an organisation – with low turnover, and above award conditions, we hold ourselves accountable for attracting, retaining and recognising great people to ensure a high standard of service for our participants.

In 2021, we launched our performance development program, enabling us to build our training and career pathways, as well as our individual development goals. This is an exciting progression for our business and testament to our commitment to our staff, our participants and our overarching services to the community.

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### About The Role: Finance and Claims Manager

The Finance and Claims Manager will lead the finance team to ensure compliance with all relevant legislation.

The Finance and Claims Manager will oversee the members of the finance team providing direction and support and supervision as required.

The Finance and Claims Manager (or his delegate) will be responsible for General Ledger, payroll and all aspects of the Financial Accounting System.

This is a privileged position in that it has immediate access to confidential company and personal data. Confidentiality and professionalism are essential to the role, and data must be maintained and not utilised in any manner not consistent with the duties of the role.

### KEY RESPONSIBILITIES

#### Plan Management

- The Finance and Claims Manager (or his delegate) will make the final decision/authorisation to lodge a claim to the NDIS
- The Finance and Claims Manager has access to the bank account where NDIS funds are released to by the NDIS and accounts for these funds as required
- The Finance and Claims Manager (or his delegate) has authorisation to disperse NDIS funds to NDIS participants Service Providers once funds are received

#### Finance

- Assist the finance team in a range of administration functions
- Produce invoices for plan managers and for all other aspects of the business (delegated)
- Collation of timesheets from CRM (delegated)
- Maintain Payroll System and pay employees when required
- Maintain all employee leave records
- Provide support for the processing of bills as needed
- Debtor management
- Maintain excellent financial and administrative record-keeping
- Payment of all payroll-related liabilities (PAYG, Superannuation, Salary Sacrifice etc)
- Payment of creditors as required
- Developing annual budgets for the organisation
- Preparing and developing monthly management reports for the GM, Audit and Risk Sub Committee and the full Board
- Maintain bank accounts and reconcile
- Providing detailed cost centre breakdown reports to the executive committee on a monthly basis
- Preparation and reporting of financial matters to the CEO
- Lodging BAS/IAS
- Workcover Acquisitions and payments as required
- Maintain excellent financial and administrative record-keeping

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- With the support of the Plan Management Team, identify and resolve discrepancies in the NDIS portal in an efficient and timely manner
- Delegate to Plan Management team to ensure all claims made via the NDIS Portal are compliant and in line with participants plan, goals and NDIS guidelines

### General Administration

- Demonstrate awareness and understanding of administrative standards as well as applicable policies and procedures including references to the NDIS, ATO, Fair Work Act, and Headway Gippsland delegations of authority

### Client contact

- Delegate authority to Plan Management support officers to liaise with the NDIS, participants and suppliers to resolve Plan Management issues and enquiries.

### Policies, Procedures & Systems

- Contribute to the development and ongoing updating of the financial policies, processes and procedures, using appropriate systems where required.
- Model the organisation's values, play a role in raising the profile of these values and associated behaviours, including a positive contribution to workplace harmony and displaying cooperative team behaviour.
- Proactively communicate, identify, report, assess OHS related risks and hazards within the centre(s).

### Continuous Improvement

- Demonstrate commitment to the objectives of the team, centre and organisation and show considerable drive and effort in achieving work and organisational goals.
- Demonstrate support for new initiatives, quality and continuous improvement activities as part of a continuous improvement process in own work, team, centre and organisational goals.

### Other

- Perform additional duties from time to time, as required by management or as stipulated in the individual performance development plan

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### REPORTING

<b>Line Manager:</b>	CEO
<b>Manages:</b>	Finance and Claims Assistant and Finance Assistant
<b>Key Stakeholders:</b>	External parties and the general public, our internal Planning and Support Teams, Volunteers, Participants, Employees and Management. And Headway Board of directors
<b>Note:</b>	Reporting arrangements may change from time to time depending on business requirements.

### KEY PERFORMANCE INDICATORS (KPI'S)

- Ability to manage and prioritise routine and ad hoc financial administrative tasks assigned.
- Maintain a high level of discretion and confidentiality, professionalism and service standards (internally and externally).
- Completion of set tasks with a high degree of quality, reliability and accuracy
- Ability to work autonomously within a small team, to appreciate differences and to build collaborative relationships which support financial administration processes.
- Demonstration of organisational and time management skills and the ability to prioritise tasks and timeframes.
- Capacity and willingness to learn and contribute to the functions and activities of Finance, and more widely, Headway Gippsland
- Demonstrated customer service skills that are in line with the values of the organisation.
- Exceptional interpersonal skills with the ability to work with a broad range of people from varying backgrounds and experiences.

### KEY SELECTION CRITERIA (KSC)

1. The minimum requirement is a Cert IV in Bookkeeping with relevant body membership as listed by NDIA
2. Preferably be a Qualified Accountant and a member of a recognised accounting body (CPA, CA or IPA)
3. Office or Financial administration previous experience in a similar administration capacity
4. Proven experience in administration functions – preferably, answering calls and email correspondence relating to payroll, invoices and receipts, delivering high-quality customer service, ideally within an NDIS-related environment.
5. Demonstrated ability to remain calm under pressure, problem solve and make effective decisions where there are competing priorities, with excellent attention to detail
6. Competent in the Microsoft Office suite and the ability to pick up new programs and business systems with ease.
7. The ability to use Xero and CRM accounting software proficiently

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8. Working knowledge of the quality and safeguard standards and their application to NDIS plan management
9. Competent understanding of the NDIA principles in relation to plan management
10. Relevant industry experience in providing services to people with disabilities

### **Compliance Requirements for Employment Eligibility**

Your employment is conditional on the provision of the following mandatory compliance items:

1. A "Clear" NDIS Workers Screen Check
2. A current Employee Working with Children Check
3. Australian Driver's License (If required)
4. Comprehensive Car Insurance (If required)
5. Proda Access

The above checks must be obtained and maintained at your own expense for the duration of your employment with Headway Gippsland Inc

- Applicants must be an Australian Citizen, Permanent Resident or hold a valid work permit or visa
- Applicants will be subject to a probation period of six months
- Applicants must provide two professional reference checks

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### Approved

Name	Debbie Lee
Position	Operations Manager
Signature	<div style="text-align: center;"> X  <hr style="width: 30%; margin: 0 auto;"/> </div>
Date	

### Incumbent Statement

I have read and understood the above position description and agree to all conditions contained herein

Name	
Signature	
Date	