

## Position Description - Plan Management / CRM Technical Administrator

<b>Position Title:</b>	<b>Plan Management / CRM Technical Administrator</b>
<b>Work Location:</b>	Based in Morwell, travel to other locations as required
<b>Employment Conditions:</b>	Permanent/ Casual/ Short Term
<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>	Operations Manager

### 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 careers, 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 launch 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: Plan Management / CRM Technical Administrator**

As an experienced and suitably qualified Plan Management / CRM Technical Administrator, you will contribute your skills, experience and qualifications in NDIS plan management to; process and support new NDIS plan requests, ensure invoices are accurately coded to participants accounts and are within the specified rules of the NDIA program, and to provide up to date and accurate information to all participants in receipt of plan management services.

The Plan Management / CRM Technical Administrator will be accountable for conducting their duties in participant invoice and receipt management to established plan management services, expected processes and performance standards including the NDIA program rules, as well as Headway administration processes and policy.

This role will actively pursue process improvement and efficiency, identifying opportunities to provide more effective plan management support to the team and ultimately the highest level of service to our participants, under the direction and mentorship of management. All work undertaken will be strictly aligned to NDIA rules and NDIS guidelines and per our policies and procedures.

This role will be responsible for the appropriate response to complex tasks, changing priorities and urgent queries and would operate in a highly autonomous manner. The Plan Management / CRM Technical Administrator will be well versed in the effective administration of our CRM, finance systems, records management and archiving processes.

The Plan Management / CRM Technical Administrator will be a skilled administrator with strong system and computer competency and experience in using CRM systems. This system services our whole business - from NDIS intake and client management to finance, HR and rostering, interfacing with each respective department. This position will be located in Morwell and may work across Gippsland in the performance of the role becoming our in-house expert in the system. This key role will be responsible for our client and employee records management, reporting and development of systems. Alongside our Finance and IT supports, this role will actively contribute to the implementation, development and training of others in our systems. This will include interpreting of system instructions provided in roll out and converting these to best fit Headway context and procedures, documenting processes for our team to learn and best utilise this new system appropriate to their roles.

The successful candidate is a trouble shooter, and thrives on the opportunity to 'own' their important role in our organisation. They will use learnings from audits and queries to develop processes to maximise efficiency and reduce errors in the system. They will monitor and report on funding levels and troubleshoot payment any system issues.

The Plan Management / CRM Technical Administrator will work to a high standard of care and diligence in accordance with Headway Code of Conduct and policies, with a commitment to learning, improvement and our participants as our priority.

This role requires a high level of customer service, as well as the ability to prioritise, organise and demonstrate initiative through responsive approaches in the workplace. The role will actively contribute to our high standards of care and participant experience, financial administrative systems and processes, thus assisting in effectiveness of our service, efficiency and customer satisfaction for our participants. Confidentiality and professionalism are essential to the role.

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### **KEY RESPONSIBILITIES**

#### **Plan Management (Including Financial Administration)**

- Ensure plan managed participants receive regular statements of expenditure.
- Ensure internal and external invoices are processed daily, on time and accurately.
- Identify and proactively resolve discrepancies in the portal in an efficient and timely manner.
- Liaise directly with the finance team to ensure revenue streams are accurately billed and invoices to third parties' suppliers are paid in a timely manner.
- Look for opportunities to streamline services and find efficiencies within the operation of the plan managed area.
- Provide support and coaching to plan managed participants to understand plans and ensure services are aligned with NDIA goals through Plan management team members.
- Assist with the design and development of policies and procedures for the plan management team.

#### **Participant Contact**

- Enable, inform and equip plan managed participants to effectively understand plans and ensure services are aligned with NDIA rules and objectives through plan management team members.
- Management of incoming phone, email and general correspondence as well as public enquiry in person, in the service of plan managed participants of Headway Gippsland.
- Provide an efficient, welcoming point of contact for actual and potential participants, carers and related parties, enabling participants to access and receive professional services from Headway.
- Liaison with a variety of stakeholders including the NDIS, NDIA and other government agencies as appropriate.
- Promote Headway Gippsland Inc. plan management services to the wider community.
- Relay accurate content to our CRM system and participant files.
- Escalate and respond to urgent participant queries and matters with empathy and professionalism to provide quality professional services.
- Demonstrate an appropriate level of verbal and written communication skills, to assist participants and provide a high level of quality service to participants.
- Contribute to timely and accurate management of participant data in our CRM and finance system, ensuring invoices and actions are resolved in an efficient and accurate manner.
- Administer any documents, correspondence, archiving, scanning and uploading in a time- efficient and organised manner, in the timelines committed.
- Appropriately refer matters to Management as necessary.

#### **General Administration**

- Collate accurate, thorough and clear records and details as they relate to our participants, processes and activities.
- Administration of CRM management for all participant related data/enquiries, as well as any other associated software or systems related to our participant data as appropriate.
- Adhere to and implement administrative standards as well as applicable policies and procedures including references to the NDIA rules, NDIS, confidentiality and participant rights.

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### **CRM System Administration**

- Producing trend analysis, reports and various functions for management decision making.
- Training and attainment of 'Super User' Status in our CRM system.
- Support to Finance in the implementation of the CRM system, attendance to staff training, as well as support to staff with their enquiries.
- Consultation and confirmation of preferred system protocols with Management, as well as confirmation of regular reporting functions to inform management decision making.
- Establishing system dashboards, reporting templates, common 'FAQ's and induction procedures for staff use of system according to their role.
- Following implementation and training, develop standard procedures for staff appropriate to their roles, as they relate to both internal (employment and policy data) and external (client) data.
- Provide induction for new staff and existing staff in system use and training, both on site and remotely for our branches across Gippsland.
- Day to day responsibility for administration of system content, staff enquiries relating to the system and reporting on both a regular and ad hoc basis.
- Establish regular reporting templates for rostering, leave and other identified trends, and produce these in line with management needs on a routine and ad hoc basis.
- Develop documentation and instruction to aide users of the system in its various functions.
- Working with Finance, the external system provider and Headway management, investigate and administer the CRM to ensure it is working to its full capacity.
- Enable employee records requirements, alerts and checklists that will also manage our staff records including; police checks, alerts, dashboards and prompts for action in a live capacity.
- Establish regular system quality assessments such as spot checking, auditing of content and continued upskilling to ensure best practice utilisation of the system for our business.
- Act as the advocate and liaison between Headway Gippsland and our provider, for continuous improvement.
- Work with team members in all parts of the business to assist with resolution of CRM issues.

### **Policies, Procedures & Systems**

- Adhere to, and comply with Headway organisational policies, processes and procedures, using appropriate systems where required.
- Demonstrate the organisation's values, 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, organisation and show considerable drive and effort in achieving work and organisational goals.
- Identify, develop and support and/or implement 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 individual performance development plan

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### REPORTING

<b>Line Manager:</b>	Operations Manager
<b>Manages:</b>	Nil, may support less established members of the plan management team in conjunction with Operations Manager
<b>Key Stakeholders:</b>	External parties and the general public, our internal Planning and Support Teams, Volunteers, Participants, Family Members, Administration, Management and other staff. Role may also interface with centre suppliers, third party agencies or supports as appropriate.
<b>Note:</b>	Reporting arrangements may change from time to time depending on business requirements.

### KEY PERFORMANCE INDICATORS (KPI'S)

- Consistency of outputs in accordance with expected service levels of our plan management team.
- Participant centered, high quality service outcomes that comply with NDIA rules, NDIS guidelines and Headway processes and policy.
- Proficient, accurate, timely and thorough management of participant records, correspondence and financial administration demands.
- Ability to self-manage and prioritise tasks, demonstrating a systematic and organised approach to work.
- Maintains a high level of discretion and confidentiality, professionalism and service standards (internally and externally).
- Ability to work autonomously within a small team, to appreciate differences and to build collaborative relationships which support these administration processes.
- Demonstrated ability to communicate with relevant staff regarding issues to effectively problem solve and make operationally effective decisions.
- Active contribution to the improvement of plan management activities, policy and practice, as well as the general operations and wider teams' success.

### KEY SELECTION CRITERIA (KSC)

1. Minimum Certificate IV Community Services (Disability) or previous financial or related administration/industry experience or equivalent qualifications would be highly regarded.
2. Demonstrated understanding of the NDIA principles in relation to plan management.
3. Relevant industry experience in providing services to people with disabilities.
4. Demonstrated commitment to organisation, efficiency, professionalism, accuracy and initiative in line with policy and procedure, under minimal supervision.
5. Working knowledge of the quality and safeguard standards and their application to NDIS plan management

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### 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 Drivers License
4. Comprehensive Car Insurance
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

### Approved

Name	Debbie Lee
Position	Operations Manager
Signature	<div style="text-align: center;">         _____     </div>
Date	

### Incumbent Statement

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

Name	
Signature	
Date	