

Position Description – Plan Management Support Officer

Position Title:	Plan Management Support Officer (Base / Mid)
Work Location:	Morwell
Employment Conditions:	Permanent/ Casual/ Short Term
Award Classification:	Social, Community, Home Care and Disability Services Industry Award 2010 <i>Headway Gippsland proudly pay above Award conditions</i>
Tenure:	Short Term Contract Length / Delete
Position Reports To:	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 Newbrough, 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 Support Officer **Choose between Base / Mid**

An excellent pathway into a progressive administration career, our Plan Management Support Officer (Base) role is a fantastic opportunity to develop and hone your administration skills, experience and potentially also, qualifications in NDIS plan management. This is an ideal role for a new entry to our industry duties and will be inducted and developed in all manner of client plan management and administrative support functions by our plan management team and management.

The intent of our Plan Management Support Officer (Base) opportunity is to enable development of those without or with limited previous experience or qualification to benefit from mentoring and training, with the view that they may develop and progress to the next levels of plan management functions and contribute confidently and competently to our services. For the right person, Headway Gippsland may support them in structuring a performance plan for further responsibilities and opportunities on our plan management career pathway.

The main objectives of a Plan Management Support Officer is to; process and support new NDIS plan requests, ensure invoices are accurately coded to client's accounts and are within the specified rules of the NDIA program, and to provide up to date and accurate information to all clients in receipt of plan management services.

This Base level opportunity ideally applies to a person who does not hold qualifications or has no or limited experience in this activity previous to their appointment. They will be provided with in house and informal training by mentors, as well as structured training from our staff to performance standards including the NDIA program rules as well as Headway administration processes and policy.

Ideally, this role will actively pursue process improvement and efficiency as they grow their capacity, identifying opportunities to provide more effective plan management support to the team and ultimately to our participants, under the direction and mentorship of the plan management team, all work undertaken will be strictly aligned to accordance with NDIA rules and NDIS guidelines and per our policies and procedures.

For complex tasks, changing priorities or urgent queries, a senior staff member (such as the Operations Manager or General Manager) would be called upon to support this role. This role will be informed by instruction from senior staff through informal and formal training as appropriate but would increasingly operate in an autonomous manner. It will be developed in the effective administration of our CRM, finance systems, records management and archiving processes and other support as requested.

The main objectives of a Plan Management Support Officer is to; process and support new NDIS plan requests, ensure invoices are accurately coded to client's accounts and are within the specified rules of the NDIA program, and to provide up to date and accurate information to all clients in receipt of plan management services.

This opportunity applies to a person with previous experience in our industry and this function, and will be complemented by in house training and supervision by our Operations Manager. The Plan Management Support Officer 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 the Operations Manager. All work undertaken will be

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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 Support Officer will be well versed in the effective administration of our CRM, finance systems, records management and archiving processes.

The Plan Management Support Officer (**Base/Mid**) 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.

KEY RESPONSIBILITIES

The key functions of this role include:

Plan Management (including financial administration)

- Process invoices accurately and efficiently within specified time frames
- Ensure invoices that are processed align with NDIA guidelines for expenditure
- Ensure plan managed participants receive regular statements of expenditure
- Ensure internal and external invoices are processed daily
- With the support of the plan management team, identify and resolve discrepancies in the portal in an efficient and timely manner
- 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
- With the support of Plan Management team, provide support and coaching to plan managed participants to understand plans and ensure services are aligned with NDIA goals
- Assist with the design and development of policies and procedures for the plan management team.

Client Contact

- Management of incoming phone, email and general correspondence as well as public enquiry in person, in the service of all Participants of Headway Gippsland
- Enable, inform and equip plan managed participants to effectively understand plans and ensure services are aligned with NDIA rules and objectives
- Provide an efficient, welcoming point of contact for actual and potential clients, carers and related parties, enabling clients to access and receive professional services from Headway
- Liaison with a variety of stakeholders including the NDIS, NDIA and other government agencies as appropriate (generally following clarification with senior and established staff)
- Promote Headway Gippsland Inc. plan management services to the wider community

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- Relay accurate content to our CRM system and client files
- Escalate and respond to urgent client queries and matters with appropriate urgency, empathy and professionalism to provide quality professional services.
- Demonstrate an appropriate level of verbal and written communication skills, to assist clients and provide a high level of quality service to clients
- Contribute to timely and accurate management of client 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 senior staff or alternate team members as necessary

General Administration

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

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, centre and 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

REPORTING

Line Manager:	Operations Manager
Manages:	Nil

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Key Stakeholders:	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
Note:	Reporting arrangements may change from time to time depending on business requirements

KEY PERFORMANCE INDICATORS (KPI'S)

- Demonstrated capacity to learn, implement and comply with Headway Gippsland financial and general administration activities and processes as directed under the NDIA rules, NDIS guidelines and per company policy or procedure
- Provision of an efficient and effective point of contact for actual and potential clients
- Ability to self-manage and prioritise tasks, demonstrating a systematic and organised approach to work.
- Maintain 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 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
- 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

KEY SELECTION CRITERIA (KSC)

1. Demonstrated capacity for learning and confident proficiency in computers, and basic Microsoft packages,
2. Previous exposure to or experience in finance administration and systems (MYOB, Xero, Reckon) is highly desirable
3. Demonstrated understanding of NDIA principles in relation to plan management, disability support services and the NDIS
4. 1-year previous experience in a similar professional or voluntary function (desired, not essential)
5. Demonstrated commitment to organisation, efficiency, professionalism, accuracy and initiative in line with policy and procedure
6. Competent in the Microsoft Office suite and the ability to pick up new programs and systems with ease
7. Working knowledge of the quality and safeguard standards and their application to NDIS plan management
8. Minimum Certificate IV Community Services (Disability) or previous financial or related

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administration/industry experience or equivalent qualifications would be highly regarded

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
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

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Approved

Name	Debbie Lee
Position	Operations Manager
Signature	<div>X</div> <hr/>
Date	

Incumbent Statement

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

Name	
Signature	
Date	