

POSITION DESCRIPTION

THE ORGANISATION



ROLE:	Plan Manager Administration Officer	TEAM:	Plan Management, Finance
SUPERVISOR:	Finance Manager	DATE REVIEWED:	4 th March 2024
<p>ABOUT INTERCHANGE OUTER EAST:</p> <p>We support families. Family wellbeing has always been and will always be at the core of everything we do. This means building strong relationships between families and our team, underpinned by listening and trust.</p> <p>We engage and empower children and young people with disabilities. We operate within a human rights framework that respects the dignity of all individuals. For us and our community, this is about children and young people having opportunities to deepen relationships, have fun, develop skills, enhance health and wellbeing, and build independence.</p> <p>We build inclusive communities. We value our Interchange Outer East community and encourage everyone to make a contribution. This builds inclusive, cohesive and equitable communities. Our community includes a range of people, such as families, children and young people, our team of staff and volunteer, partners and other community members.</p>			
EMPLOYEE PURPOSE	Be family focussed Uphold human rights Participate and encourage an inclusive community Develop trust with all in the IOE community Contribute to a safe and fun environment	AIM OF ROLE	A Plan Manager's role is to help you navigate the NDIS system, so you can make the most of your funding and achieve your goals. If you choose to have your plan managed, the Plan Manager handles all the paperwork involved in making purchases or paying for services through the scheme.
JOB SUMMARY	<ol style="list-style-type: none"> 1. Assisting customers with their transition to the NDIS and ensuring they understand their plans 2. Claim participant funding from the NDIS for the supports that participants purchase 3. Pay providers for the supports that participants purchase 4. Help participants to keep track of their funds 5. Take care of financial reporting for the participant 6. Provide advice to participants regarding what supports may be claimed 7. Assist the client to work within a budget 		
KEY OUTCOMES	<ol style="list-style-type: none"> 1. Ensure accurate record keeping for the acquittal of NDIS funds and audit processes 2. Ensure timely and quality data flow between IOE and the NDIS portal, including service bookings, claiming and remitting 3. Respond to client enquiries in a timely manner 4. Update participant information on a variety of databases 5. Support participants and/or their nominee to establish and work within a budget 6. Regularly review participants' plans and budget balances and advise relevant parties of any concerns (i.e. running low on funds) 7. Ensure service agreements are prepared in a timely manner for each new plan 8. Ensure services agreements are signed and returned by clients and filed appropriately 9. Generate monthly statements and encourage and assist clients to read and understand them 10. Work directly with providers to resolve any billing issues 		

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RESPONSIBILITIES

CORE CAPABILITIES & EXPECTED BEHAVIOURS

Staff Support

- Contribute to maintaining a productive and harmonious team
- Treat all IOE stakeholders with dignity and respect
- Support your team members to achieve desired outcomes
- Be honest and open and communicate any concerns regarding individuals, work practices or working conditions to your manager
- Provide reception support and backup as required
- Provide backup and support during times of other team members leave

Participant and Family Support

- Foster positive relationships with IOE plan managed clients
- Treat all people with dignity and respect
- Model good working practices

Administration

- Complete incident reports where necessary
- Participate in meetings relevant to your role
- Share in the team meeting roles, including timely preparation of minutes
- Maintain a healthy and safe workplace
- Accurately complete a fortnightly timesheet
- Consult with manager regarding changes to your work hours
- Consult with manager regarding leave requirements, including leave applications
- Participate in the audit process
- Ensure information on databases is accurate
 - Plan dates
 - Participant details
 - Support category amounts

Training

- Undertake ongoing self-education regarding disability services, products and suppliers
- Participate in ongoing training and skills development, including induction

IOE Responsibilities

- Participate in team and other IOE meetings
- Abide by IOE's policies and procedures

KEY SELECTION CRITERIA

- Clear and concise communication skills, verbal and written
- Demonstrated competence in use of MS Office and web-based platforms
- Display a high level of integrity and honesty when managing participants' funds
- Work both independently and in a team environment
- Produce work with a high degree of accuracy
- Sound knowledge and experience of administrative practices, procedures and processes
- Understanding or experience working within the NDIS environment

KEY RELATIONSHIPS AND INTERACTIONS

- IOE managers and team leaders
- Clients and/or their nominee
- Support coordinators
- IOE accounts team
- NDIA

QUALIFICATIONS AND PROFESSIONAL MEMBERSHIPS

- Minimum Certificate III in Bookkeeping or Accounts or experience in a related field