



## NDIS Plan Management Officer Position Description

### POSITION DESCRIPTION:

<b>Position title:</b>	NDIS Plan Management Officer
<b>Status:</b>	Part Time
<b>Location:</b>	Bendigo Head Office or Ballarat or Mildura
<b>Classification level:</b>	SACS Level 4
<b>Award</b>	<i>Social, Community, Home Care and Disability Services Industry Award 2010</i>
<b>Reporting to:</b>	Manager of Plan Management
<b>Date Approved:</b>	Feb 2024

### WORKING ENVIRONMENT

#### Code of Conduct

All employees must abide by the Organisational Code of Conduct.

#### Occupational Health and Safety:

As an employee, you must be aware of and comply with requirements of the relevant Workplace Health and Safety legislation and associated regulations. This includes taking responsibility for your own health and safety and that of others in the workplace and complying with the Organisations occupational health and safety policies and procedures.

#### Performance Review:

A Performance Review will be conducted using the Organisations Performance Management Process.

### POSITION SUMMARY

An employee at this level provides direct care assistance for clients of the Organisation.

An employee at this level is also expected to effectively supervise and support the team to ensure delivery of the service objectives by providing essential skills, knowledge and support to the team and perform a consultative role to staff in relation to clients with high and complex needs.

## LEVEL OF RESPONSIBILITY

This position is directly responsible to their immediate supervisor for all aspects of service delivery and organisational management whilst at work. The performance of this position is subject to general direction by the immediate supervisor of the relevant program in which the employee is working. The employee is required to set outcomes, demonstrate sound judgment and contribute critical knowledge and skills where procedures are not clearly defined and to effectively prioritise the workload and to maintain a high quality in the service provided.

The employee has the authority to decide on day-to-day work related issues within the key responsibilities and duties and to contribute to further develop of work methods where general work procedures are not defined. Any issues falling outside these areas are to be referred to the supervisor of the relevant program in which you are working.

## SUPERVISION

An employee at this level works under general direction, operates within established routines, methods, standards and procedures although there is greater scope to contribute to the development of work methods and the setting of outcomes and is expected to exercise initiative in the application of established work procedures and is responsible for managing time, planning and organising their own work. An employee at this level is expected to manage time, setting of priorities, planning and organising their own work and that of lower classified staff and/or volunteers.

## KEY TASKS AND DUTIES *(including Key Performance Indicators)*

The below list details the current duties performed by plan management assistants daily.

- Educating participants, families/guardians, providers, and Lifely employees on NDIS guidelines and the price guide and identifying services and programs in their geographical area.
- Agree to comply with Lifely's Confidentiality and Conflict of Interest policy whilst adhering to the The Privacy Act
- Checking invoices are compliant with the ATO and NDIS guidelines.
- Liaise regularly with LAC's, NDIA planners, support coordinators and other stakeholders for clarification and evidence to substantiate the claim.
- Regularly exercise judgement and set outcomes in response to difficult queries and situations with assistance from the NDIS helpdesk
- Promoting other Lifely services and cross referring when asked for services by participants and families.
- Strengthen the capacity of participants and families to understand their financial budget and the different components of their NDIS plan.
- Empower and encourage participants and families/guardians, at scheduled check ins, to utilise their NDIS funding to support continued funding at their next review.
- Engage and encourage participants and families/guardians that are not currently engaged in services.
- Provide excellent customer service with participants and families/guardians to encourage repeat business.
- Adhere to ATO, NDIS and Lifely compliance requirements
- In conjunction with marketing, organize blogs/news stories for participants and family's education.



- Other relevant duties to the position as required.

#### *Key Performance Indicators*

- **Growth** – Meet agreed performance targets both financial and growth
- **Accuracy of data** – processing provider and participant invoices
- **Maintaining standards and participant records** – ensure compliance with relevant Standards and Statutory obligations
- **Customer Satisfaction** – Maintenance of positive customer relations with Participants and all stakeholders

### **SELECTION CRITERIA**

- Demonstrate how you are a responsive team member who genuinely cares and respects others professionally.
- Experience in the provision of financial support, digital filing systems and databases.
- Demonstrate your strong attention to detail, analytical and problem solving skills
- Demonstrate your understanding of confidentiality, The Privacy Act and Conflict of Interest.
- Strong interpersonal, verbal and written communication skills.
- Experience in meeting deadlines and your ability to process financial data accurately.

### **QUALIFICATIONS**

- Relevant qualification with relevant experience in book-keeping;
- an equivalent level of experience and expertise to undertake the range of activities required.

### **OTHER REQUIREMENTS**

- Proof of eligibility to work in Australia
- Approved NDIS Worker Screening Clearance
- Approved Working with Children Clearance as per state requirements.
- NDIS Worker Orientation Module Certificate
- COVID-19 Vaccination Booster Certificate
- A current Victorian driver's licence



## SIGNATURES

**Signed for and on behalf of the Organisation:**

Name: \_\_\_\_\_ Signature: \_\_\_\_\_  
Position: \_\_\_\_\_ Date: \_\_\_\_\_

**The Employee:**

I acknowledge that my duties and responsibilities are as outlined in this position description. I further acknowledge that my duties may be varied from time to time.

Name: \_\_\_\_\_ Signature: \_\_\_\_\_  
Position: \_\_\_\_\_ Date: \_\_\_\_\_