

## Position Description

Position Title	Plan Management Coordinator
Position Reports to	Accountant
Position Leads	NIL
Location	29 Learmonth St, Alfredton.
Employment Type	Part-Time
Last Updated	November 2023

### Why are we here?

**Purpose:** We partner with our customers to create their best life.

**Our Vision:** To fulfill the unmet needs of our community and enrich lives every day.

### How do we do this?



### What is your purpose?

To provide Plan Management services to our participants including the processing of participants invoices and the claiming of funds through NDIS. Customer service is the key to the success of this role including providing excellent customer service to each of the key stakeholders being participants, their advocates, support coordinators and service providers.

### How do you achieve this? (Responsibilities)

Key Results Area	Accountabilities
Service Delivery	<ul style="list-style-type: none"> <li>Follow the established procedures for Plan Management processing within the required deadlines.</li> <li>Produce and send monthly participant reporting by the 5<sup>th</sup> business day of each month.</li> <li>Communicate with the provider payments team to rectify any shortfall in funding for a participants plan.</li> <li>Build effective relationships with the Finance and Administration team as well as the Executive team.</li> <li>Build effective relationships with Plan Management Clients, their advocates and/or their support coordinators to deliver excellent customer service.</li> <li>Work with McCallum Finance and Admin Team to problem solve queries, concerns or complaints that relate to Plan Management.</li> </ul>

	<ul style="list-style-type: none"> <li>• Contribute to wider Finance initiatives and projects as requested.</li> <li>• Work collaboratively with the Accountant and Financial Accountant to continuously improve services.</li> </ul>
<b>Customer Experience and Quality</b>	<ul style="list-style-type: none"> <li>• Ensure effective record keeping and that all administration and documentation is kept up to date.</li> <li>• Contribute to the development and improvement of Plan Management related policies and procedures.</li> <li>• Assist in ensuring McCallum’s Finance operations remain compliant with all relevant legislation, regulations and standards.</li> </ul>
<b>Employee Experience and Collaboration</b>	<ul style="list-style-type: none"> <li>• Promote a positive and safe work culture by: <ul style="list-style-type: none"> <li>○ Complying with the requirements of the Victorian Occupational Health and Safety (OHS) Act 2004 and related McCallum OHS Policies and Procedures</li> <li>○ Identifying and resolving any OHS hazards and incidents in a timely manner in alignment with the policy</li> <li>○ Wearing and maintaining personal protective equipment and clothing correctly</li> <li>○ Correct manual handling procedures are followed</li> </ul> </li> <li>• Ensure all policies and procedures are followed in line with our quality management system</li> <li>• Keep informed of changes to policies, procedures and McCallum new by regularly checking Blink.</li> <li>• Ensure effective record keeping and ensure all documentation is kept up to date</li> <li>• Champion McCallum’s code of conduct and values, acting in accordance with our policies and procedures at all times.</li> </ul>
<b>Self-care and professional development</b>	<ul style="list-style-type: none"> <li>• Participate in monthly feedback meeting with the Financial Controller.</li> <li>• Ensure Annual Performance Goals and KPIs are set, with professional development plan implemented and monitored</li> <li>• Identify and seek appropriate resources to support your own health and wellbeing</li> <li>• Participate in wider McCallum projects and initiatives as required.</li> </ul>

### What do I need to be a success? (Attributes)

- Our customers are at the centre of everything that you do
- You champion customer experience and provide positive, professional, optimal service to our customers, staff, community and stakeholders.
- Quality, safety and risk management is paramount to you and will not be compromised.
- You are a consultative, collaborative and inclusive team member.
- You achieve results. You have a strong attention to detail, work to plans and deliver.
- You build and maintain relationships with your participants, their families and care givers, and your colleagues.
- You are team player that actively participates and champions a supportive and values driven work environment.

## Key Selection Criteria

Successful appointment to a position will be subject to a pre-employment safety screening process which includes, but not limited to, the following checks:

- **NDIS Worker Screening Check**
- **Right to Work in Australia; and**
- **Current Drivers License.**

### Essential

- Proven experience in delivering excellent customer service.
- Demonstrate a high level of numeracy, written and verbal communication skills.
- Demonstrate the ability to work independently and manage work to meet required deadlines.
- Experience in Microsoft Office Suite, including but not limited to, Outlook, Word, Excel and PowerPoint

### Desirable

- Experience in QuickBooks and Receipt Bank
- Knowledge of National Disability Insurance Scheme (NDIS)

### Approval:

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_

CEO Signature: \_\_\_\_\_ Date: \_\_\_\_\_