**POSITION DESCRIPTION**

**Client Contracts Officer**

# **ABOUT UNITING**

**Our purpose:** To inspire people, enliven communities and confront injustice.

**Our values:** As an organisation we are **Imaginative, Respectful, Compassionate** and **Bold**.

At Uniting, we believe in taking real steps to make the world a better place. We work to inspire people, enliven communities and confront injustice. Our focus is always on the people we serve, no matter where they are at in their life.

Our services are in the areas of aged care, disability, mental health, child and family, community services, and chaplaincy and we get involved in social justice and advocacy issues that impact the people we serve. As an organisation we celebrate diversity and welcome all people regardless of disability, lifestyle choices, ethnicity, faith, sexual orientation or gender identity. We commit to respecting children and take action to keep them safe.

Uniting is the services and advocacy arm of the Uniting Church NSW & ACT and as such Uniting leaders understand, support and can express the mission and purpose of the Uniting Church.

# **ABOUT THE ROLE**

This is a role within the Client Administration Team. This team is a part of the Finance, IT and Property Directorate. The Client Administration Team provides a central point of contact for issue of Permanent Residential Agreements and all associated finance/contract/disclosure related matters as well as recording of client events within the Finance and Subsidy system and additionally, dealing with account related inquiries and follow up for the Ageing group of Services.

This role is focused on the timely negotiation and issue of Permanent Residential Care Residency Agreements and the ongoing support of clients through their residency in Residential Aged Care in terms of financial and contractual matters.

# ROLE KEY ACCOUNTABILITIES

You’ll play a valuable role as a member of the Client Administration Team in:

* Contributing to a stronger and more unified Uniting
* Working towards the defined priorities and outcomes for the Client Administration Team and your specific areas of accountability
* Working with your colleagues to understand and apply the translation of Uniting and Business Stream strategies through your regional and/or local plans, thereby ensuring a consistency in service delivery, practice and maximising performance
* Actively participating in communication in order to understand and contribute to a One Uniting way of operating
* Working productively and collaboratively as a positive role model both within your team and with others across Uniting

As Client Contracts Officer your role will:

* Contribute towards the efficiency and effectiveness of the Client Administration Team and the client-facing activity of the Finance Directorate specifically in regards to Residential Aged Care services
* Liaise with Residential Aged Care Services to ensure timely and accurate processing and notification of bed offer acceptances to ensure early issue of Residency Agreements
* Undertake checks to ensure client is admitting on a valid Care Assessment plus all required documentation is supplied by the client or their authorised representative including a negotiated method of payment, preferably direct debit
* Issue of Residential Permanent Residency Agreements prior to or as soon as possible after date of entry and including all negotiations and discussions with client or their authorised representative
* For transfers between Services ensure any transfer of lump sum payments are made within legislative and contractual provisions and timeframes
* Track Daily Movement Sheets to ensure all permanent admissions are monitored and acted on and all Bed Moves follow security of tenure and pricing provisions
* Assist in the processing of data entry of admissions into the Finance System including Accommodation Fee and supplement setup at entry, set up changes for accommodation payment matters as required
* Answer client or potential client inquiries, specifically relating to accommodation payment and means assessment matters.
* Follow up on matters such as Means Assessment, return of contracts & options sheets, and Fee Confirmation letters
* Follow up with clients, Services Australia or other Finance Team members regarding Means Tested and Daily Accommodation Contribution letters as well as unpaid lump sums
* Liaise with other Finance Transaction Team members around transactional adjustments required or liaising on client fee, bond, supplement or set-up matters
* Record notes and attach documents against client records within the Finance System
* Create client Residency Agreements and organise execution of same, as well as timely return to client of their executed Agreement copy.
* Ensure the Residential Services provide up-to-date and complete pre-admission, admission and disclosure paperwork
* Ensure all activity is in line with legislative and contractual provisions and timeframes
* Assist in housekeeping activity for effective database management of the Finance System.

# **ABOUT YOU IN THE ROLE**

**Your classification:** EA – Professional Support Officer Level 1

**Your directorate:**  Finance, IT and Property

**You’ll report to:** Senior Client Contract Officer

**Your key relationships:**

Internal:

* With other members of the Client Administration Team
* With Services including Service Managers and their delegates as well as Service Administration/Admissions Staff & Admissions Specialists
* With other Finance Team members including Revenues and Receivables
* With other Directorates including Marketing

External:

* Clients and their authorised representatives
* Medicare
* Services Australia
* Aged Care Assessment Team & My Aged Care

# **YOUR RESPONSIBILITIES**

**Financial management:**

* Ensure that all activities and operations within the scope of responsibility are performed in accordance with the allocated budget and policy guidelines
* Monitor actual supported ratio and occupancy rates to budget

**Operational Processes**

* Accurately collect and maintain the financial/administrative documentation necessary to support permanent Residential Aged Care client admission and residency processes
* Client setup and data adjustment of Residential Aged Care clients within the Finance and Billing system
* Prepare all permanent Residential Aged Care Residency and Supplementary agreements to support the admissions and bed move processes.
* Engage in permanent Residential Aged Care client financial and contractual discussions and negotiations of accommodation payment amounts and method of payment.
* Ensure follow up and receipt of Means confirmation letters, Option Sheets, Residency Agreements and other required client documentation
* Engage in follow up in all matters regarding a client’s accommodation payment status including quarterly reviews of Contribution amounts, required documentation to confirm a client’s supported status or Means Not Disclosed/Means Tested Fees matters. This will include follow up with both the client or their representative and/or Department of Human Services/Medicare as well as Revenues & Receivables.
* Answer financial and contractual queries by enquirers, applicants and clients (or their representatives)
* Ensure provision of current information and application packs to Services and update as required including regular reviews of same to ensure currency and correct disclosure and admissions processes being followed
* Liaise with Service Line Managers and Service Administrative staff regarding bed offers, vacancies, bed moves and provide support and training as required in regard to financial and contractual matters
* Ensure that all documentation (including agreements) is completed either prior to admission or within 7 days of resident admission, but in any case as required by regulation.
* Ensure signed Residency Agreements are returned by client or representative, Compliance certificate provided plus arrange for agreement to be executed and returned to client or representative within legislated timeframes
* Maintain up to date contract register and other control files as required
* Attach required documentation (including Resident Agreement) and notations to client records in the Finance and Billing system and on Client File.
* Support Process in regards to Accommodation Payment payments, transfers and refunds, including rollover calculations and processes and liaising with clients regarding transfer instructions
* Respond to phone and written enquiries.
* Assist in debtor management including ensuring clients provide a signed direct debit authority or other negotiated payment method, phone calls to clients to follow up unpaid lump sums and Payment/Contribution fees as well as Means Tested Fee matters
* Assist with completion and lodgement of Trustee and Guardian applications for at risk clients
* Maintaining currency of information regarding Government requirements and legislation to ensure organisational compliance.
* Provide back up support to other team members in the event of leave and / or periods of heavy workload
* Provide support and backup to other Team members of the Client Administration Team
* After consultation, you’ll be willing to undertake additional duties, transfer to another equivalent position or assume higher duties when required
* Contribute to the implementation of Uniting policies, processes, systems and platforms (including technology) so as to ensure efficiency of the wider organization
* Maintain awareness of and fulfill responsibilities, authorities and accountabilities as defined by Uniting’s health, safety and wellbeing management system and in adherence to the attached WHS responsibilities by role
* Participate and comply with all quality management systems and processes

**Client Management:**

* Ensure all required financial and contractual disclosure is made to applicants, inquirers and clients.
* Liaise with clients and their representatives in regards to interim Accommodation Payment Status arrangements around accommodation fee billing and payments
* Liaise with clients and their representatives to establish continuity of relationships and facilitate harmonious outcomes in the event of a need to resolve any financial or contractual issue.
* Ensure financial and contractual dealings are only undertaken with client or their authorised representative. An authorised representative should present evidence of same including valid Power of Attorney.
* Maintain a high standard of conduct and work performance to promote our reputation with key internal and external stakeholders.
* Liaise with other Client Administration Team member and Service Managers to ensure provision of service and follow up on enquiries
* Answer client and service enquiries regarding client contracts and financial arrangements
* Provide a high level of customer service for inbound and outbound calls, letters and emails
* Fulfil operating level agreement requirements for provision of information to the Finance Transactions Team or service streams.
* Ensure that engagement with external parties enhances Uniting’s reputation and growth
* Maintain a high standard of conduct and work performance to promote our reputation with key internal and external stakeholders

**People Management:**

* Act as a constructive member of the Client Administration Team and the broader Finance team
* Contribute to a culture of openness, feedback and productivity
* Actively engage and participate in the performance management framework and review processes across Uniting
* Engage in professional development and set and fulfill development goals for yourself;
* Contribute to the creation of a cohesive and productive team
* Build and maintain effective team relationships – within own team and across business streams / functions
* Positively model the Code of Conduct and Ethical Behaviour for Uniting
* Represent the Uniting culture and values internally and externally, communicating and acting in ways that are consistent with values of Bold, Respectful, Imaginative and Compassionate
* Model the values and an understanding of the Uniting Church, respecting and valuing the inherent dignity and uniqueness of each person, celebrating diversity, prioritising collaboration, passionately pursuing social justice and inclusion
* Take care for the safety of yourself and others at all times and undertake work in a safe manner in accordance with policies, procedures and instructions (written or verbal) and in adherence to the attached WHS responsibilities by role

# YOUR KEY CAPABILITIES

**Financial management:**

* Performance is monitored on an ongoing basis and financial targets achieved as established by the annual budget process
* Financial and contractual requirements and associated legislative disclosure and timeframes obligations are met during admission and residency processes, including 100% compliance with Prudential and Disclosure Obligations.

**Operational processes:**

* All stakeholders in your area of responsibility are constantly communicated with and remain informed and involved in appropriate aspects and projects.
* Client records set up and maintained to Uniting Ageing quality standards
* Processes administered according to process documents and within required timeframes for completion

**Client management:**

* Client feedback indicates their respect for your services (work) provided and a good working relationship
* Effective client relationships are in place and stakeholders indicate high levels of satisfaction with service delivery
* Clients satisfied to agreed standard as measured by satisfaction surveys or client feedback processes
* Client enquiries handled within service level agreements and resolved within a reasonable timeframe
* All admissions documentation is completed prior to admission or within seven days of resident admission, but in any case as required by regulation.
* Demonstrated understanding of the requirements for the Privacy and Protection of personal information.

**People management:**

* Feedback from your line Manager confirms your contribution as a member of the Client Administration Team
* Feedback from colleagues and their teams confirms your contribution to an integrated Uniting
* Standards of professional behaviour demonstrate alignment with the Uniting values and are effectively role modeled in all workforce interactions
* Active participation in the formal annual performance review process.and team building activities

# QUALIFICATIONS & EXPERIENCE

**Qualifications:**

* Higher School Certificate or equivalent clerical/administrative work experience

**Your experience ticks the following boxes:**

* Administrative Experience in the health or aged care sector
* Excellent written and oral communication skills
* Data Entry skills in AX/PeoplePoint or other like systems
* Effective skills at Customer service and interaction with aged care clients and their families or representatives
* High level of attention to detail and orientation towards quality in written documentation and records keeping
* Competent applied knowledge of Medicare subsidy claims rules and processes
* Competent applied knowledge of aged care regulatory requirements
* A demonstrated passion for social change and contributing to an organization of influence for the most disadvantaged
* Skilled at navigating a complex organization and forging relationships

**Even better:**

* Tertiary qualification in a relevant field

**Core Competencies:**

* You operate with personal integrity and a values base that aligns with Uniting’s
* You succeed through excellent communication skills and a high service orientation
* You engage successfully with clients and other team members as required
* You are capable but do not have “something to prove”
* You manage projects and juggle tasks to ensure delivery against objectives
* You have strong written and verbal communication skills
* You thrive on helping others to succeed; even if it is at a cost to you
* You are an exceptional team player
* You have a high level of energy and enthusiasm
* You leverage your experience without always referring to it
* You thrive on successful outcomes
* You genuinely care about the organisation

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| **Employee Name:** |  | **Managers Name:**  **Title** | Senior Client Contract Officer |
| **Date:** |  | **Date:** |  |
| **Signature:** |  | **Signature:** |  |