

POSITION DESCRIPTION

Senior Client Administration 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 services are in the areas of aged care, disability, 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 lifestyle choices, ethnicity, faith, sexual orientation or gender identity.

Uniting is one of the largest not-for-profit community service providers in NSW and the ACT, with a rich history of providing services to the community for more than 100 years. We have more than 550 services, as far north as Tweed Heads, as far west as Broken Hill, and as far south as the ACT.

Our focus is always on the people we serve, no matter where they are at in their life. Our range of supports and services are designed in partnership with clients and around their needs

ABOUT THE ROLE

This is a Team Leader role within the Client Administration Team. This team is a part of the Finance Functional Directorate. The Client Administration Team provides a central point of contact for recording of client events within the Finance, Billing and Subsidy system and additionally, dealing with account related inquiries and debtor follow up for the clients recorded within the Finance and Billing System (PeoplePoint).

This role is a Team Leader position with the Team being focused on assisting clients with finance and account related enquiries, with follow through to resolution, as well as processing data entry of client events within the Finance and other related Systems.

This role leads a Client Administration Team (CAT) for the service streams of Residential Care (Unanderra based team) or Community Care, Independent Living, and other Housing (Garden Suburb based team), to support compliance with regulatory contractual and reporting requirements. To act as central point of contact for client administrative and finance related enquiries and follow up.

ROLE OBJECTIVES

You'll play a key management role as a Team Leader and member of the Client Administration Team in:

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- Developing a stronger and more unified Uniting
- Defining the priorities and appropriate outcomes for the Client Administration Team and your specific areas of accountability
- Working with your colleagues to translate Business Stream strategies into regional and/or local plans and tactics, thereby ensuring a consistency in co-ordination and that performance is maximised
- Communicating Uniting and Business Stream strategies and plans to team members in engaging ways, translating these into meaningful work and fostering a One Uniting way of operating
- Providing team leadership and working productively as a positive role model

As Senior Client Administration Officer your role will:

- Provide efficient and effective management of the Client Administration Team based at either Unanderra or Garden Suburb
- Ensure clients are correctly admitted, set up and managed on Uniting administrative systems to enable correct billing, collection, contractual and subsidy administration
- Maintain registers including for bond/RAD/IC payments, transfers and refunds
- Ensure regulatory and contractual compliance with disclosure, contracts, receipt and refunds of residential bonds/RADs and Independent Living ingoing contributions
- Ensure effective conduct of client facing discussions, correspondence and activities related to debtor management, including account enquiries and follow up of unpaid accounts and unrepresented cheques.
- Manage client refunds and ad-hoc direct debit processes and follow up
- Ensure non-standard accounts are issued in a timely fashion each month, including for HCP statements and departed clients
- Manage administration of Medicare event data entry and changes in ACFI details (Residential Care)
- For Community clients ensure data syncing with Carelink+ and including client exclusion reports, invalid client checks and HCP client departure processes (Community Care).
- Ensure effective liaison with all service streams to ensure all client movements are recorded in systems in a timely and accurate manner.
- Work in support of other Uniting functions and teams to foster coordination across the organisation, avoiding duplication, standardizing on efficient processes and delivering continuous improvement

ABOUT YOU IN THE ROLE

Your classification: EA – Clerical Grade 5 (AA)
Your directorate: Finance – Client Services (Client Administration Team)

You'll report to: Client Administration Manager
Your direct reports: Client Administration Officers, Client Payments and Refunds Officer and Client Administration Officer – Debtor Management.

Your key relationships:

Internal:

- Service based staff including Residential Care and Community Service Managers, Village Managers, Support advisors and service administration staff
- Other Team members of the Client Administration Team

- Other teams in Finance including Revenue and Receivables, Accounts Payable and General Ledger and Management Accountant Teams as well as Transactions Manager, Head of Legal and Other finance staff
- Heads of Operations and Area Managers
- Community Care Direct and 1800 Contact Centre
- Sales and Contracts staff for Independent Living
- Other functional teams including PLC and Payroll

External:

- Clients and Customers in Residential Care (Unanderra based team) or Community Care, Independent Living, and other Housing (Garden Suburb based team)
- Authorised representatives of these clients and customers including Trustee and Guardian
- Medicare , Department of Human Services, Department of Veteran's Affairs and other government agencies.

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
- Manage functional/team expenditure in accordance with agreed plans, timelines and executive expectations
- Achieve objectives for your areas of responsibility by allocating resources; reviewing progress and adjusting course of action as required
- Ensure relevant Balance Sheet accounts such as Client Debtors, Resident Funds, Waiting List (Holding) and Respite Deposits, Bond and Ingoing contribution Liability are monitored and, in some cases, reconciled
- Prepare & Issue Financial reports as required such as monthly client debtor reports

Operational Processes

- Ensure effective systems in place to ensure all client movements are reported by the Service streams and are correctly inputted to PeoplePoint in a timely and accurate manner
- Ensure lodgement and monitoring of Medicare events and entry of Aged Care Funding Instrument (ACFI) related information to PeoplePoint
- Provide and / or make arrangements for the provision of supervision, training, instruction, information and equipment necessary for staff to perform duties in a safe, effective and efficient manner.
- Ensure checking process for validation of bonds, RADs and ICs set up and calculations such as interest and refunds, rollovers and transfers.
- Ensure data integrity through monitoring and checking processes
- Ensure data syncing with other systems as required including CL+ , CRM and Medicare
- Ensure processes for HCP clients are followed including departure processes and communication to clients
- Effective debtor management including unpaid accounts and bad debt provision
- Ensure all fee and bond related amounts are updated in PP and notified to clients and staff
- Regulatory compliance and reporting regarding administration of bonds/RADs.
- Complete regulatory reports as required.
- Ensure Client Database housekeeping occurs on a regular basis
- After consultation, you'll be willing to undertake additional duties, transfer to another equivalent position or assume higher duties when required

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- Implement Uniting policies, processes, systems and platforms (including technology) so as to ensure efficiency of the wider organization
- Provide and / or make arrangements for the provision of supervision, training, instruction, information and equipment necessary for staff in your area of responsibility to perform duties in a safe, effective and efficient manner
- 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:

- Liaise with Service/Village Managers and other Client Admin Team members to ensure provision of service and follow up on enquiries
- Ensure client refunds are processed in a timely manner
- Answer client and service enquiries regarding client accounts and proactively follow up account problems such as overdue payments and rejected transactions
- Follow Customer Service Charter and ensure a high level of customer service is provided by the Team
- Establish regular communication processes with Finance to ensure resolution of enquiries and fulfil operating level agreement requirements for provision of information to Finance
- Maintain a high standard of conduct and work performance to promote our reputation with key internal and external stakeholders.
- 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 overall Finance Team
- Represent the Client Administration Team and its decisions to your own team members
- Actively engage and participate in the company's performance management framework and review processes.
- Act in a manner which upholds and positively models the organisation's Code of Ethical Behaviour.
- Structure and staff your Client Administration Team with appropriate skills, capability and talent.
- Proactively develop and lead a cohesive and productive team
- Drive a culture of openness, feedback and productivity
- Positively model and hold direct reports accountable for upholding the Code of Conduct and Ethical Behaviour for Uniting
- Provide role clarity to your direct reports and team, ensuring that performance expectations, development and accountabilities are clearly set and that progress is monitored and assured with provision of effective feedback
- Build and maintain effective team relationships – within own team and with others
- 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 and your team
- Model and 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

KEY PERFORMANCE INDICATORS

Financial management:

- Performance is monitored on an ongoing basis and financial targets achieved as established by the annual budget process
- Bonds, RADs and ingoing contributions received on time and in full
- Bonds, RADs and Ingoing Contributions are refunded with legislative and/or contractual timeframes and compliance
- Overdue payments received within reasonable time after escalation and follow up with client
- Correct lodgement of Medicare events and data input into PeoplePoint as well as data syncing with other systems as required.
- Planned initiatives are delivered on time and to budget.
- Effective debtor management with balances to targets set.
- Non compliances are reported immediately

Operational processes:

- All stakeholders are constantly communicated with and remain informed and involved in appropriate aspects and projects of the performance of your team or area
- Bonds, RADs and ICs received and refunded within regulatory/contractual timelines
- Client records set up and maintained to Uniting quality standards
- Processes administered according to process documents and within required timeframes for completion
- Process changes are implemented within timeframes and effectively
- Compliance reports prepared accurately and on time

Client management:

- Client feedback shows sustained improvement
- Client feedback indicates their respect for services (work) provided and a good working relationship with you and your team
- 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

People management:

- Feedback from your line Manager confirms your effectiveness as a people manager and your positive contribution as a member of the Client Administration Team
- Feedback from colleagues and their teams confirms your contribution to an integrated Uniting
- Safety reports confirm WHS as a priority and effective management/reduction of incidents is evidenced
- Standards of professional behaviour demonstrate alignment with the Uniting values and are effectively role modeled in all workforce interactions

- Staff engagement survey indicates high level of engagement from the team and endorses your role as manager
- Formal annual performance reviews are conducted against agreed KPI's for all direct reports and position descriptions are reviewed and updated annually
- Participate in the formal annual performance review process.

THE IMPORTANT DETAILS

Qualifications:

- HSC or similar level qualifications with relevant aged care clerical/administrative experience

Your experience ticks the following boxes:

- Five years of clerical / administrative experience
- Five years of proven effective Customer Service
- Aged or Community Sector experience
- Existing supervisory experience and proven ability to lead or supervise administrative staff
- A demonstrated passion for social change and contributing to an organization of influence for the most disadvantaged
- Skilled at navigating a complex organization, forging relationships, and managing through influence rather than direct authority as required

Even better:

- Diploma or Degree qualification in Management or Accounting

Core Competencies:

- You operate with personal integrity and a values base that aligns with Uniting's
- Your written and verbal communication skills are outstanding
- Your attention to detail and orientation towards quality in written documentation and record keeping is outstanding
- You succeed through excellent communication skills and a high service orientation
- You are an exceptional team player.
- Your team management skills have established high morale and engagement
- You manage projects and juggle tasks to ensure delivery against objectives
- Your strong relationship management and influencing skills have been proven
- You thrive on helping others to succeed; even if it is at a cost to you.
- You have a high level of energy and enthusiasm.
- You engage successfully with a wide range of stakeholders
- You are confident without being arrogant.
- You are capable but do not have "something to prove"
- You leverage your experience without always referring to it.
- You thrive on successful outcomes and not on processes.
- You genuinely care about the organization and your staff.

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| Employee Name: | | Managers Name: | |
| | | Title | |
| Date: | | Date: | |
| Signature: | | Signature: | |

| ACCOUNTABLE POSITION | WHS ACCOUNTABILITIES (AS PER WHS ACT 2011) | ACTION DEMONSTRATING ACCOUNTABILITIES |
|---|--|---|
| <p style="text-align: center;">LINE MANAGERS AND SUPERVISORS (WORKERS WITH LINE MANAGEMENT ACCOUNTABILITY FOR WHS)</p> | <p>While at work, all workers (WHS ACT 2011 Sec 28) must:</p> <ul style="list-style-type: none"> - take reasonable care for his or her own health and safety - take reasonable care that his or her acts or omissions do not adversely affect the health and safety of other people - comply, so far as the worker is reasonably able, with any reasonable instruction that is given by Uniting to allow the organisation to comply with this Act - co-operate with any reasonable policy or procedure of Uniting relating to health or safety at the workplace that has been notified to workers | <p>A manager/supervisor in these roles must demonstrate active and visible leadership for WHS by:</p> <ul style="list-style-type: none"> - familiarise yourself with the Uniting WHS policy and procedures to understand personal accountability for WHS - ensure work is carried out according to Uniting WHS policy and procedures in your areas of responsibility - understand WHS hazards in the workplace by: <ul style="list-style-type: none"> - discussing WHS monthly activities at team meetings - speaking regularly to workers and safety personnel - reviewing hazard and incident reports - attending risk assessments - ensuring workers receive training, support and supervision to do their jobs safely - promptly address WHS issues brought to you for resolution, including consultation with staff - take up WHS issues to your manager where unresolved at the site level - keep records of WHS activities accessible for viewing by safety personnel and Safe Work inspectors - prepare WHS information about your workplace(s) for discussion with your supervisor |