

POSITION DESCRIPTION

Client Administration Officer – Debtor Management

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 role within the Client Administration Team. This team is a part of the Finance Functional Division. The Client Administration Team provides a central point of contact for recording of client events within the Finance and Subsidy system and account related enquiries and follow up for the Ageing group of Services.

This role is focused on provision of debtor management on current and departed clients, whilst acting as a central point of contact for departed client accounts including refunds, statements and debtor recovery. To support other client administration activities as required.

ROLE OBJECTIVES

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 Administration 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 Ageing services
- Support all Service streams with effective debtor management on current client accounts
- Manage all departed accounts through issue of accounts and letters, organising of fee overpayment refunds, and follow up on unpaid amounts including claims on Estates if required
- Respond by phone and written correspondence to client account and other enquiries
- Follow up on rejected Direct Debits and also negotiate/monitor repayment arrangements and plans, arrange fixed payment updates
- Provide regular Debtor Reports to Service Stream and other Management/Directors
- Prepare Financial Guardian applications and attend Hearings as required
- Undertake client data checks using both formal and informal means
- Answer client fee/account enquiries and follow up on matters such as rejected Direct Debits, general debtor matters and enquiries.
- Liaise with other Finance Transaction Team members around transactional adjustments required or liaising on client fee or set-up matters
- Record notes and attach documents against client records within the Finance System
- Assist in housekeeping activity for effective database management of the Finance System.

ABOUT YOU IN THE ROLE

Your classification: EA - Clerk Admin Grade 4
Your directorate: Finance
You'll report to: Senior Client Administration Officer

Your key relationships:

Internal:

- With other members of the Client Administration Team
- With Services including Service & Village Managers, Service Administration Staff and Community Care Direct
- With other Finance Team members including Revenues and Receivables and Accounts Payable

External:

- Clients and their authorised representatives
- Medicare
- Department of Human Services
- Trustee and Guardian

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

Operational Processes

- Undertake debtor management activity including but not limited to;
 - phone calls to clients to follow up unpaid accounts and rejected payments
 - departed client statements
 - Estate claims
 - Negotiate payment plans and alternative payment methods
 - Follow up on Direct Debit rejections, monitor/organise Fixed Payment updates (including Centrepay and Direct Debits) and monitoring of payment plans
 - Prepare bad debt reports and recommendations
 - Prepare submissions to Trustee and Guardian and attend hearings
 - Update control sheets
- Respond to phone and written enquiries.
- Provide general administrative support for database management including special needs field management etc.
- 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:

- Liaise with Client Contract Officers/Village Managers/Support Advisors/Service Managers to ensure effective debtor management and prevention of arrears
- Answer client and service enquiries regarding client accounts and proactively follow up account problems such as overdue payments and rejected transactions
- Issue & manage non-standard monthly accounts to departed clients
- Provide a high level of customer service for inbound and outbound calls 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

KEY PERFORMANCE INDICATORS

Financial management:

- Performance is monitored on an ongoing basis and financial targets achieved as established by the annual budget process
- Awareness of KPI for maintaining debtor amounts within required parameters, as notified from time to time

Operational processes:

- General Debtor management on current and departed clients which includes follow up letters and phone calls at 60,90 and 120 days (in line with Service Stream requirements)
- Client records set up and maintained to UnitingCare Ageing quality standards
- Processes administered according to process documents and within required timeframes for completion
- Issue of various monthly/ regular debtor reports within required timeframes
- All stakeholders in your area of responsibility are constantly communicated with and remain informed and involved in appropriate aspects and projects.
- 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
- Assisting in and/or attending Trustee/Guardian applications/hearings as required
- 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:

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Approval date: June 2017		Reviewed: 6/06/2017

- 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

THE IMPORTANT DETAILS

Qualifications:

- Higher School Certificate or equivalent clerical/administrative work experience

Your experience ticks the following boxes:

- Administrative and Debtor Experience in the health or aged care sector
- Excellent written and oral communication skills
- 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
- 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 and not on processes
- You genuinely care about the organisation

Employee Name:		Managers Name:	
		Title	Senior Client Administration Officer
Date:		Date:	
Signature:		Signature:	

ACCOUNTABLE POSITION	WHS ACCOUNTABILITIES (AS PER WHS ACT 2011)	ACTION DEMONSTRATING ACCOUNTABILITIES
WORKERS (EMPLOYEES, AGENCY STAFF, CONTRACTORS, VOLUNTEERS, STUDENTS)	<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>All workers must:</p> <ul style="list-style-type: none"> - follow Uniting WHS policy and programs to protect the health and safety of people at work and to understand your personal responsibilities for WHS - attend and/or complete safety-related training including induction and emergency preparedness - comply with WHS instructions from your supervisor/manager, training information, safe work procedures and emergency wardens - if performing new or unfamiliar work, seek information, instruction or training and supervision from your supervisor to perform work safely without risking the health, safety and wellbeing of yourself or others - use equipment that has been provided for your health, safety and wellbeing - report all hazards, incidents and injuries to your immediate supervisor - participate in discussions/consultation about changes to workplace/premises or job task/practice - wear clothing, footwear and personal protective equipment (PPE) needed appropriate for the work being done - do not put other people's health, safety and wellbeing at risk by your action or inaction