

POSITION DESCRIPTION

<u>Position Title:</u>	CLIENT SERVICES OFFICER
<u>Classification:</u>	Social and Community Services Employee - Level 3
<u>Employment Status:</u>	Full-Time (Fixed Term Contract – 12 Months)
<u>Department/Program:</u>	Personalised Support
<u>Report to:</u>	Team Leader – Client Services
<u>Location:</u>	67 Sutherland Road, Armadale
<u>Issued:</u>	29/8/19

I have read, understand and accept this position description. I agree to notify my supervisor immediately of any change in my capacity to meet the requirements. I also agree to inform my supervisor if any of the following requirements change:

- drivers license status (if applicable)
- police check status & DWES status or
- the capacity to fulfil the inherent requirements of the role

Employee's Name:

Employee's Signature

Date: / /

SALARY

The classification applicable to the position is Level 3 in accordance with the Social, Community, Home Care & Disability Services Industry Award 2010.

POSITION OBJECTIVE:

This Client Services Officer (CSO) will act as the first point of contact to receive and respond to initial service enquiries for the organisation. The CSO role is critical to the successful operation of the personalised supports team and is often the first point of contact for staff, services users, services providers and the general public.

The CSO is responsible for coordinating and rostering a dedicated team of direct support professionals committed to the delivery of quality support and customer focused service to Inclusion Melbourne's service users. The CSO will roster and liaise with direct support staff taking particular care to match the needs and specific requirements of individual service users. The CSO will also provide day to day direction and support to the team of direct support staff as well as coordinating the transport needs of Inclusion Melbourne service users.

Our Values

Integrity

“To consistently act on sound moral principles”

We will act with integrity by:

- Being respectful
- Doing what we say we'll do and being open about how we do it
- Being honest about what we can and cannot achieve
- Acting in a manner that is deserving of your trust
- Having skilled, competent and professional employees

Potential

“The inherent ability or capacity for growth”

We will see the potential of all persons by:

- Believing that everyone has the potential to keep achieving more
- Ensuring that everyone has equal opportunities for development
- Understanding that overcoming obstacles is a necessary part of the journey to success

Individuality

“A single person regarded as a unique personality, distinguished from others by special qualities”

We will embrace individuality by:

- Acknowledging uniqueness and accepting differences in a non-judgemental manner
- Using a person-centred approach to meet the unique needs of each person
- Supporting people to make choices that build the lives they want
- Working with people in unique and personalised ways
- Respecting individual and family customs, practices, beliefs, traditions and heritage

Relationships

“A significant connection existing between people and communities”

We will foster relationships by:

- Being honest with each other
- Supporting and encouraging each other
- Connecting people with their community and nurturing new relationships
- Working together to solve problems
- Listening to each other to achieve mutual understanding
- Strongly believing that together people create better lives

KEY RESULTS AREA – Client Services/Enquiries	
Responsibilities and Duties	Key Performance Indicators (KPI's)
<p>Competently assess all service enquiries & referrals to determine service eligibility.</p> <p>Enter enquiry information into the CRM (Lumary)</p> <p>Refer enquiry to relevant business unit</p> <p>Provide accurate and timely information to customers, their families and other service providers.</p> <p>Assist and support customers and their families to achieve the best outcomes possible through services they receive from Inclusion Melbourne.</p> <p>Collaborate with internal and external stakeholders to obtain information to enable appropriate customer service and advice.</p> <p>Effectively resolve enquiries and complaints and escalate matters to the Team Leader.</p>	<ul style="list-style-type: none"> • Enquiries & referrals processed in accordance with the agreed procedures. • Service enquiries & referrals entered into Lumary, meet eligibility requirements. • Positive stakeholder relationships development and maintained. • Models & provides excellent customer service to all stakeholders.
KEY RESULTS AREA – Roster Management	
Responsibilities and Duties	Key Performance Indicators (KPI's)
<p>In consultation with the Client Services Team Leader, coordinate the development of rosters for direct support staff that are compliant with rostering guidelines, staff availability and service user needs.</p> <p>Where necessary, provide support to direct support staff while they are performing shifts.</p> <p>Ensure that all components of the service delivery are appropriately managed.</p> <p>Ensure that rosters are cost effective and use of resources is efficient</p> <p>Ensure workforce needs are monitored and liaise with Team Leader and HR to replenish staffing resources, reducing the need to engage agency staff</p> <p>Ensure all data in the rostering system is accurate and up to date and that all changes are actioned daily.</p> <p>Ensuring the quality of services rostered and delivered meets appropriate performance standards</p> <p>Optimising rostering efficiency to ensure minimum non billable hours</p> <p>Ensuring shift allocation is within participants' plans and all allocated shifts comply with award provisions</p>	<ul style="list-style-type: none"> • Rosters are developed /amended daily to support continuity of care with consideration to service user preferences and geographical location of service users and direct support professionals • Rosters are developed in advance for each pay period and disseminated to relevant workers within agreed timeframes • All shifts are covered by appropriately matched staff • Queries on rosters are resolved promptly • Travel between service users is minimised to decrease the costs to the service user and the organisation • Complete a fortnightly audit prior to rosters being sent to ensure contracted hours are met. • Staff availability regularly updated and maintained in Skedulo system • Rosters are cost effective and efficient. • Workforce needs are regularly reviewed and use of Agency staff is minimal • Rostering data is accurate and up to date. • A reduced number of queries regarding staff rosters and reduced number of phone calls from families/carers • Positive feedback from families/carers • Timely and accurate completion of rosters and approval of services • Shifts distributed on a fair and equitable basis.

KEY RESULTS AREA – Information Management & Staff Support

Responsibilities and Duties	Key Performance Indicators (KPI's)
Timely and regular provision of relevant information to Direct Support Professionals, Team Leaders, families and significant others.	<ul style="list-style-type: none"> Provides direct support staff with information necessary to ensure the smooth running of the support delivered Advises Team Leader of any changes and concerns reported by direct support staff Service Users and/or families/carers are informed of any changes to roster prior to changes being made Staff and families/carers are informed as soon as possible of any changes to rostered shifts Accurate and timely documentation of any client issues or concerns. Participant roster change requests are case noted.
Provision of appropriate support to Disability Support Professionals.	<ul style="list-style-type: none"> Supports Team Leader in initial orientation of direct support staff as delegated Provides additional information and guidance to staff in the use of Skedulo Presents in-house training to direct support staff related to scheduling and rostering.

KEY RESULTS AREA – Service User Transport

Responsibilities and Duties	Key Performance Indicators (KPI's)
Liaise with service users,' families and carers, Inclusion Melbourne business units and the taxi company to ensure transport bookings are managed in a timely and efficient manner and in accordance with the taxi procedure.	<ul style="list-style-type: none"> All service user transport needs carried out to the satisfaction of the client and in accordance with the taxi procedure.
Update and maintain master and current taxi running spreadsheets.	<ul style="list-style-type: none"> Master and current taxi running spreadsheets accurate and updated according to agreed timeframe.
Inform participant/families should any changes effect the delivery of service.	<ul style="list-style-type: none"> Participant/families regularly informed of any changes in service delivery.
Participate and be proactive in resolving issues as they arise.	<ul style="list-style-type: none"> Taxi issues resolved (where possible) at first point of contact.
Develop and maintain relationships with service user transport providers.	<ul style="list-style-type: none"> Good relationship with taxi provider.
Monitor weekly taxi activity reports and follow up any discrepancies.	<ul style="list-style-type: none"> Accurate taxi activity reports. Activity reports monitored on a weekly basis. All discrepancies resolved.

KEY RESULTS AREA – Operational and Administrative Support	
Responsibilities and Duties	Key Performance Indicators (KPI's)
Provide comprehensive, high quality administrative support to the personalised supports team, in consultation with the Team Leader, Client Services.	<ul style="list-style-type: none"> Administrative support is readily available to support the operational requirements of the department. Team Leader is satisfied with the level and quality of support provided.
Create, complete and maintain relevant documentation for clients/participants and/or employees/resources including referrals, schedules, service requests etc. utilising Lumary, Skedulo and other organisational systems.	<ul style="list-style-type: none"> Data management and reporting completed within agreed timeframes. Electronic and paper filing systems are well organised and maintained. All sensitive / confidential information managed with integrity and maturity. All documentation is completed with 100% accuracy, within agreed timeframes. All documentation is completed in accordance with organisational policy & procedure and relevant NDIA reporting requirements. Accurate reconciliation of delivered service hours with claims related to delivered services
<p>Liaise with Team Leader, Client Services regarding service agreement balances of participants to ensure no over servicing occurs</p> <p>Maintain current and accurate referrals and customer and support/service delivery information as per service agreements and Inclusion Melbourne's policies and procedures.</p> <p>Participate in the continuous improvement and development of service delivery and other associated processes.</p> <p>Ensuring services are delivered within the framework of Inclusion Melbourne's policies and procedures.</p> <p>Ensure that services delivered are managed efficiently to minimise financial loss to Inclusion Melbourne</p> <p>Monitor 'no shows' to ensure that days lost are within the NDIA guidelines</p> <p>Maintain a working knowledge of the NDIS price guide.</p> <p>Ensuring accurate and timely completion of payroll data for finance and billing purposes</p> <p>Undertake other ad hoc administrative duties as required.</p> <p>As delegated by Team Leader, ensure all files, notes and documentation is maintained and updated in accordance with organisational policy</p>	<ul style="list-style-type: none"> Services delivered are in accordance with agreed service items and within NDIA guidelines and in accordance with Inclusion Melbourne's policies and procedures All client data is current and accurate Participates in continuous improvement activities. Services delivered are managed carefully minimising financial loss to the organisation Demonstrates a sound working knowledge of the NDIS Price Guide Payroll & finance activities completed accurately and in accordance with agreed timeframes. Documentation is maintained and updated in accordance with organisational policy.

KEY RESULTS AREA – OUR TEAM	
Responsibilities and Duties	Key Performance Indicators (KPI's)

Staff Engagement	<ul style="list-style-type: none"> • Participates in regular supervision and performance reviews • Contribution to the recognition of opportunities for process improvement, and to propose and subsequently implement approved changes to process
Teamwork	<ul style="list-style-type: none"> • Attends and participate in relevant meetings • Contributes to the development of the team ensuring communication is positive and effective • Models high standards of teamwork • Openly supports and respects diversity within the team • Works with team members to assist in planning and achievement of timelines, goals and outcomes • Proactively supports other team members.
KEY RESULT AREA – CUSTOMER EXPERIENCE	
Responsibilities and Duties	Key Performance Indicators (KPI's)
Demonstrates an upholds IM Values	<ul style="list-style-type: none"> • Values of Inclusion Melbourne are incorporated into daily work practices.
Customer Service (Internal & External)	<ul style="list-style-type: none"> • Models & provide excellent customer service to all stakeholders • Feedback from all stakeholders is complimentary • Low level of complaints from all stakeholders • Able to articulate a comprehensive knowledge of all aspects of Inclusion Melbourne's services
KEY RESULTS AREA – OTHER	
Responsibilities and Duties	Key Performance Indicators (KPI's)
Maintain and monitor a healthy and safe work environment for all stakeholders.	<ul style="list-style-type: none"> • Ability to assess risk in the context of service delivery to a diverse range of clients, in a diverse range of settings, and the ability to implement risk mitigation strategies
Maintain and promote a workplace free from discrimination and harassment of any kind and to follow the organisational grievance procedure to report any discriminatory or harassing behaviour.	<ul style="list-style-type: none"> • Workplace free from discrimination & harassment.
Training & Development	<ul style="list-style-type: none"> • Attends relevant training • Demonstrates positive initiative and takes opportunities to increase skills • Active participation in supervision meetings • Feedback is accepted in an open and receptive manner.

ORGANISATIONAL RELATIONSHIPS

<u>Reports to:</u>	Team Leader
<u>Supervision:</u>	N/A
<u>Internal Liaisons:</u>	Personalised Supports Community Support Team Administration & Finance Team Inclusion Training Team Human Resources
<u>External Liaisons:</u>	People supported by Inclusion Melbourne, their families and/or carers National Disability Insurance Agency Non-government organisations External service providers Specialist agencies and services Members of the public Contracted professionals

ACCOUNTABILITY:

Accountable for tasks allocated to the role, by the Team Leader, Client Services.

The incumbent is accountable for:

- Managing initial service enquiries
- Ensuring the timely rostering of staff to support participants to achieve their goals.
- Coordination of service user transport.
- Completion of administrative tasks as delegated by the Manager, Personalised Supports and the Team Leaders.
- Providing support, assistance and general information to Direct Support Professionals.
- Maintaining client privacy and confidentiality.

EXTENT OF AUTHORITY, JUDGEMENT & DECISION MAKING:

In order to achieve the duties and responsibilities of the position, the Client Services Officer is expected to:-

- make decisions and exercise judgement in appropriate situations
- be responsible for responding to the day to day enquiries, personalised supports administration tasks and service user transport arrangements
- provide general information and direction to Direct Support Professionals relating to service delivery
- ensure work undertaken is performed in accordance with the organisations policies and procedures and other well defined practices
- guidance and advice is always available from the Team Leader
- exercise a degree of autonomy
- exercise professional judgement
- establish priorities and monitor work flow in areas of responsibility
- use initiative to identify or predict an issue that may arise and assess resolution options using sound problem solving skills, reference to documented procedures, methods & instructions
- alert management of any potential issue or crisis.

CONDITIONS OF EMPLOYMENT:

Terms and conditions of employment are in accordance with the Social, Community, Home Care & Disability Industry Award 2010 and the National Employment Standards (NES). Visit Inclusion Melbourne's website, staff portal page for further information.

This position is full-time. The contract is fixed term: 12 months duration with the potential for ongoing employment.

QUALITY AND CONTINUOUS IMPROVEMENT:

Inclusion Melbourne has adopted a Quality Management program that incorporates continuous, incremental improvement in all services provided to external and internal stakeholders, and in all associated policies, processes and procedures.

All staff members are required to display commitment to, and to participate in, the Quality Management program by constantly striving to introduce improved practice and efficiency in the performance of their duties in order to ensure the continuous improvement of the organisation.

KEY SELECTION CRITERIA:

Essential:

- A genuine interest in, and commitment to Inclusion Melbourne's vision, mission and values of integrity, potential, individuality and relationships and the organisations strategic directions
- Demonstrated ability and experience in rostering processes
- Proven administrative and organisation skills
- Experience maintaining computerised client information systems
- Demonstrated competency in the use of a computer and the Microsoft Office suite
- Ability to plan ahead and problem solve in complex situations
- Proven team-work skills and the ability to work collaboratively or to undertake independent activities where necessary
- Sound written and oral communication skills, including the ability to communicate effectively with a range of stakeholders
- Current Victorian Driver's License

Desirable:

- Excellent interpersonal and communication skills and demonstrated success in working effectively with a diverse range of people
- Experience working in an administration position within a busy team environment
- Knowledge of the NDIS price guide
- Own Vehicle
- Knowledge of Enrite care and Skedulo or other Customer Relationship Management (CRM) systems.

GENERAL INFORMATION

CONDITIONS OF EMPLOYMENT

Terms and conditions of employment are in accordance with the Social, Community, Home Care & Disability Industry Award 2010 and the National Employment Standards (NES). A copy of the Award and the NES guidelines are available on Inclusion Melbourne's website. For further information refer to the Conditions of Employment policy.

QUALITY AND CONTINUOUS IMPROVEMENT

Inclusion Melbourne adopts a continuous improvement approach in all services provided to external and internal customers, and in all policies, processes and procedures. All staff members are required to display commitment to, and to participate in continuous improvement by constantly seeking to introduce efficiencies and economies in the performance of their duties as a contribution to ongoing productivity improvement.

PRIVACY, SECURITY & CONFIDENTIALITY

Inclusion Melbourne acknowledges and respects the privacy of individuals' and adheres to the Privacy Principles of the Health Records Act 2001; the Information Privacy Act 2000; the Commonwealth Privacy Act 1988 and the Australian Privacy Principles. These control the way Inclusion Melbourne collects, stores, uses and discloses personal information.

Staff will be expected to:

- Ensure information held regarding the people we support, employees and volunteers is stored securely.
- Use or disclose personal information only for the purpose for which it was collected.
- Take reasonable steps to protect personal information from; misuse, loss and unauthorised access, modification and disclosure.
- Take reasonable steps to make sure that the personal information collected, used or disclosed is accurate, complete and up-to-date.
- Take reasonable steps to destroy or de-identify personal information that is no longer required for the purpose it was held.

Inclusion Melbourne is committed to ensuring that the privacy and confidentiality of all people we support, staff, volunteers and business information is maintained by all associated with Inclusion Melbourne.

How you will be measured in your role

All staff are subject to an annual performance appraisal and at other set times during the year. The performance appraisal will be completed in relation to your position description and the delivery of your KPIs (Key Performance Indicators). The responsibilities, duties and KPIs for your role are defined and listed in your position description. A performance appraisal form is to be completed in collaboration with your manager.

The performance appraisal process has four components:-

- **Part 1 – Key responsibilities & KPIs: to measure competence** in all Key Performance Indicators as required by the role (and identified in the position description)
- **Part 2 – Current agreed action plan:** to identify goals and opportunities for improvement that allow you to fulfil individual and organisational objectives
- **Part 3 – Training & development opportunities undertaken since last appraisal**
- **Part 4 – Development & training plan for next twelve months**
- **Part 5 – Employee's overall comments on the session**
- **Part 6 – Supervisor's overall comments on the session**

GENERAL INFORMATION

Training & Development

Inclusion Melbourne will provide training internally and externally to encourage employees at all levels to reach their potential. All employees are required to undertake any compulsory training courses offered at Inclusion Melbourne. Staff are also required to show others how the systems under their control operate.

Occupational Health, Welfare and Safety

The Board and management are totally committed to the development, implementation and maintenance of policies and procedures, which sustain a safe and healthy work environment.

Management recognises its duties and responsibilities under the Occupational Health and Safety Act 2004, and accepts accountability of the management of OHS programs and the resolution of health and safety issues.

All staff shall accept that they have a duty of care to protect not only their own Health and Safety, but also that of their fellow employees, service users, contractors, volunteers and the public. Staff are expected to participate with management in the continual improvement of workplace standards. All staff will assist with injury management initiatives and co-operate with Return to Work programs within the workplace.

Policies & Procedures

A comprehensive set of policies and procedures are available on Inclusion Melbourne's online quality portal, system. It is expected that all staff familiarise themselves with the organisation's policies and procedures.

Probationary Appointment

In accordance with the provisions of the Fair Work Act and Regulations, a six month probationary period will apply, to relevant positions.

Superannuation

Inclusion Melbourne will make superannuation contributions in accordance with its obligations under the Superannuation Guarantee (Administration) Act 1992. Employee contributions are optional.

Unless an alternative accredited superannuation fund is nominated on commencement of employment, employees will be required to join Inclusion Melbourne's default superannuation fund.

Salary Packaging

Participation in Inclusion Melbourne's Salary Packaging and Employee Benefits Program is entirely optional for all employees. Inclusion Melbourne recommends that employees seek independent financial or taxation advice about salary packaging before commencement of packaging arrangements. Copies of salary packaging documentation will be provided to staff at the commencement of their employment, or on request at any time after commencement.

For further information please visit the website of our salary packaging provider AccessPay or contact AccessPay directly.

- Phone – 1300 133 697 (8am-6pm ACST Mon-Fri)
- Email – customerservice@accesspay.com.au
- Fax – 1300 361 498

GENERAL INFORMATION (CONTINUED)

Long Service Leave

Long Service Leave is provided for in the National Employment Standards (NES) and Inclusion Melbourne's Conditions of Employment policy.

Annual Leave

Annual Leave is provided for in the National Employment Standards (NES) and Inclusion Melbourne's Conditions of Employment policy.

Personal/Carer's Leave & Compassionate Leave

Personal/carer's leave and compassionate leave are provided for in the National Employment Standards (NES) and Inclusion Melbourne's Conditions of Employment policy.

Ceremonial Leave

An employee who is legitimately required by indigenous tradition to be absent from work for Aboriginal or Torres Strait Islander ceremonial purposes will be entitled to up to 10 working days unpaid leave in any one year, with the approval of the Chief Executive Officer. Further details refer Inclusion Melbourne's Conditions of Employment policy.

Parental Leave

Parental Leave is provided for in the National Employment Standards (NES) and Inclusion Melbourne's Parental Leave policy.

Purchase Additional Leave

Refer Conditions of Employment policy and the Additional Leave Purchase Employee Information Booklet.

Designated Breaks

It is a long established custom and practice of Inclusion Melbourne to shut for business on the day before Melbourne Cup Day and over the Christmas/New Year period. A calendar will be developed by the Chief Executive Officer (or delegate) noting designated breaks and public holidays and distributed to all staff each year.

Termination of Appointment

Notice of termination is provided for in the NES. The notice of termination required to be given by an employee is the same as that required of an employer except that there is no requirement on the employee to give additional notice based on the age of the employee concerned. If an employee fails to give the required notice the employer may withhold from any monies due to the employee on termination under the award or the NES, an amount in respect of the period of notice required by this clause less any period of notice actually given by the employee. The period of notice is as follows:

1 year or less	1 week
1 year and up to the completion of 3 years	2 weeks
3 years and up to the completion of 5 years	3 weeks
5 years and over	4 weeks

In addition, employees over 45 years of age at the time of the giving of notice with not less than two years continuous service, are entitled to an additional week's notice.

Right to Work in Australia

You must either be an Australian citizen; or have permanent residence status; or have an appropriate visa issued by the Department of Immigration and Citizenship that entitles you to work in Australia.

Smoke Free Work Place

The organisation has a "No smoking" policy in all Inclusion Melbourne buildings. Smoking is also prohibited in organisational vehicles.

GENERAL INFORMATION (CONTINUED)

Criminal Record Check

A criminal records police check must be undertaken prior to employment for all persons who are the preferred applicants for all positions. An unsatisfactory assessment may result in the applicant not being appointed. Appointment is subject to a satisfactory police check. An applicant who refuses to complete the appropriate forms will not be appointed.

Disability Workers Exclusion Scheme (DWES)

It is a condition of your engagement with Inclusion Melbourne that your employment is subject to the operation of the Disability Worker Exclusion Scheme (DWES), as amended from time to time. The Scheme is maintained by the Department of Health and Human Services.

Other Employment or Conflict Of Interest

During your employment with Inclusion Melbourne, you must not, without the Chief Executive Officer's prior consent, undertake any appointment, position, work or other employment (whether paid or unpaid), that:

- results in you competing with Inclusion Melbourne
- (e.g. enter into a private arrangement with a family with whom you have come into contact with via Inclusion Melbourne);
- results in you using confidential information
- (e.g. client contact details) for competitive purpose or personal gain;
- otherwise adversely affects Inclusion Melbourne; or
- affects the performance of your duties to Inclusion Melbourne.

This consent will not be reasonably withheld; Inclusion Melbourne acknowledges that part-time and casual staff are likely to hold positions with multiple employers.

Return of Documents & Property

Upon the termination of your employment with Inclusion Melbourne, or at any time on the request of Inclusion Melbourne, you will immediately deliver up to Inclusion Melbourne, all documents which were prepared by or on behalf of Inclusion Melbourne, or which belong to any client or customer of Inclusion Melbourne, and which are in your care, custody, or control, and all other property belonging to Inclusion Melbourne.

Use of Private Vehicles for Work Related Activities

Where an employee is authorised to use his/her own vehicle for work related activities, a mileage allowance is paid in accordance with the Award. Persons using their own vehicle for work related purposes are strongly encouraged to take out motor vehicle insurance cover and to inform their insurer of the work related nature of the vehicle usage.

Risk Management

All staff have a responsibility to understand and observe the Risk Management Policy and related procedures in accordance with training and instruction given, and to report any risk to their immediate supervisor. Risks that affect the organisation may result from property damage, unethical or fraudulent behaviour or illness and injury to people.

Equal Opportunity & Diversity

All appointments will be made in conformance with the spirit and intent of the Equal Opportunity and Anti-Discrimination legislation. Inclusion Melbourne is committed to maintaining a diverse workforce that reflects the diverse needs of the people we support. Inclusion Melbourne is an equal opportunity employer and encourages applications from people with a disability, and from culturally and linguistically diverse backgrounds including Aboriginal and Torres Strait Islanders, and the LGBTIQ community.