

POSITION DESCRIPTION

<u>Position Title:</u>	Intake Officer
<u>Classification:</u>	Social and Community Services Employee - Level 3
<u>Employment Status:</u>	Part time
<u>Department/Program:</u>	Systems, Operations and Communications
<u>Report to:</u>	Head of Systems, Operations and Communications
<u>Location:</u>	Armadale
<u>Issued:</u>	9 February 2024

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:

- driver license status (if applicable)
- police check status & NDIS Worker Clearance or
- the capacity to fulfil the inherent requirements of the role

Employee name

date: / /

Employee signature

POSITION OBJECTIVE:

The Intake Officer is an integral role within the organisation and will be the first point of contact for participants and their nominee / family. They will have primary responsibility for supporting participants and their nominee / family to understand the service options available at Inclusion Melbourne, select the services that meet their needs and facilitate the participant's commencement with the relevant services and departments. This will also include marketing Inclusion Melbourne services.

This role will involve connecting with families via phone, email, or directly with families at Inclusion Melbourne sites, or in the community.

The Intake Officer will be required to work closely with internal departments, and Inclusion Melbourne's RTO, requiring exceptional internal stakeholder management, communication and collaboration.

The Intake Officer will be responsible for maintaining efficient, accurate, and timely data entry, system management, and documentation. Additionally, they will fulfil reporting requirements as directed by the Team Leader or Manager and as required will accompany the Team Leader during meet-and-greet engagements.

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 – Enquiry	
Responsibilities	Duties
Ensure participant and other service enquiries are assessed and actioned promptly and eligible participants transitioned to intake seamlessly.	<ul style="list-style-type: none"> • Process enquiries and participant referrals within the established intake framework, and contact the participant within 24 hours of initial contact • Monitor NDIS referrals, and emails via the intake planner, and process within 24 hours. • Provide clear and accurate information to prospective participants, including information packs as required. • Clearly articulate the benefits of respective service options • Ensures eligibility and compatibility with Inclusion Melbourne services. • Maintain intake processes, which document and track participant services requested, funding, organisational capacity, and any wait times if relevant. • Remains informed as to the current capacity of each department to ensure prospective participants can be informed promptly re wait times. • Maintains and manages wait list and contacts participants as capacity becomes available. • Use initiative to ensure appropriate communication is maintained with prospective participants throughout the intake process.
KEY RESULTS AREA – Intake	
Responsibilities	Duties
Successfully support Inclusion Melbourne's services areas, and leadership to select and allocate relevant funding from their plan and document via service agreement	<ul style="list-style-type: none"> • Conduct Intake interview with Participant, and establish service details with participant including: <ul style="list-style-type: none"> ○ Type of support /Department ○ Category and line item support will be charged to ○ Hours of support ○ Duration and frequency of supports • Ensure that completed service agreements are signed by the participant / their representative in a timely manner
Ensure all required information is collected, kept current and correctly located within Inclusion Melbourne systems and support a smooth transition to subsequent plans and services	<ul style="list-style-type: none"> • Complete all intake fields / assessments in Brevity. • Obtain and upload relevant reports into Brevity. • Ensure all relevant documentation is promptly entered into Brevity. • Ensures payment agreements are in place for participants who are self / plan managed. • Where required support Team Leaders and Service departments by providing information in an accurate and timely manner. • Support departments with administration, and ensuring Brevity is up to date and accurate to prepare a smooth transition to subsequent plans and services. • Revise and update information on Brevity, including exits from departments or services. • Ensure departments are collectively informed of participant service changes that may affect them.
KEY RESULTS AREA – Business Development	
Responsibilities	Duties
Actively builds business and contributes to the development and refinement of	<ul style="list-style-type: none"> • Complete and provide data reports to supervisor including commencements, exits, trends and customer feedback.

service model.	<ul style="list-style-type: none"> • Visit services, schools, attend expos and support marketing of Inclusion Melbourne services. • Maintains current knowledge of NDIS that can affect Inclusion Melbourne's service delivery.
KEY RESULTS AREA – OUR TEAM	
Responsibilities	Duties
Staff Engagement	<ul style="list-style-type: none"> • Participate 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"> • Attend and participate in relevant meetings. • Contribute to the development of the team ensuring communication is positive and effective. • Model high standards of teamwork. • Openly support and respect diversity within the team • Works with team members to assist in planning and achievement of timelines, goals and outcomes. • Proactively supports other team members.
Business Support and Administration	<ul style="list-style-type: none"> • As required fulfil generalist business support administration tasks to support Inclusion Melbourne, including reception duties, incoming phone calls, inputting and updating data within software systems, and other relevant tasks as directed.
KEY RESULT AREA – CUSTOMER EXPERIENCE	
Responsibilities	Duties
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 stakeholders is complimentary; • Able to articulate a comprehensive knowledge of all aspects of Inclusion Melbourne's services. • Represent Inclusion Melbourne at regional and metro networks and forums, as relevant.
Support key business functions of the organisation ensuring a positive public image of Inclusion Melbourne is presented.	<ul style="list-style-type: none"> • Positive customer feedback. • All communication is positive and effective. • Manage participant's through the exit process and provide feedback to supervisors.
KEY RESULTS AREA – Other	
Responsibilities	Duties
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>	Head of Head of Systems, Operations and Communications
<u>Internal Liaisons:</u>	Personalised Supports Community Supports Administration & Finance staff Support Coordination Inclusion Training Designlab
<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 the intake of participants, general service enquiries and supporting the delivery of high-quality person-centred services to participants including: -

- Facilitating seamless engagement and implementation of services and supports.
- Supporting departments through each stage of service re engagement.
- Professionally representing Inclusion Melbourne through marketing and business development.

This will be achieved through: -

- Adhering to Intake systems and processes.
- Setting priorities and monitoring work flow.
- Monitoring participant enquiry, intake and re engagement data.
- Representing Inclusion Melbourne and promoting service options at relevant events.
- Effective and efficient communications with all stakeholders.

EXTENT OF AUTHORITY, JUDGEMENT & DECISION MAKING:

To achieve the duties and responsibilities of the position, the Intake Officer is expected to: -

- Have freedom to act within defined established practices;
- undertake a variety of tasks of a specialised and/or detailed nature under general direction;
- with support, establish priorities and monitor work flow in areas of responsibility
- use initiative to identify, or predict an issue may arise and assess or think through resolution options using sound problem-solving skills and discuss with supervisor
- not commit the organisation to any obligations beyond the scope of the duties
- alert management of any potential issue or crisis.

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 organisation's strategic directions
- Exceptional ability to articulate service offerings and support participants to understand the benefits of Inclusion Melbourne service offerings
- Sound knowledge of NDIS, including the price guide and reading NDIS plans

- An appropriate tertiary qualification or other formal qualifications or work experience related to inclusive person-centred service design and delivery
- Proven teamwork skills and the ability to work both collaboratively and independently
- Exceptional Microsoft Office skills and ability to competently use a client relationship database
- Exceptional interpersonal skills with colleagues and all stakeholders
- Sound written and oral communication skills, including the ability to communicate effectively with a range of stakeholders
- Current Victorian Driver's License and access to vehicle

Desirable:

- Excellent interpersonal skills and demonstrated success in working effectively with a diverse range of people
- Previous experience with Intake systems within the disability sector