



Job Description
DSA Mentoring Services
Claiming Officer

POSITION: Claiming Officer
DIVISION: Community & Home Living
REPORTS TO: Manager
SUPERVISORY RESPONSIBILITY: NIL
ISSUE DATE: February 2021

<p>Our Mission: Enabling opportunities for Choice, Inclusion and Achievement for people with disability and their families and carers</p>	<p>Our Core Values: We put people first We are one team We are all accountable We strive to always do it better We are inspired by challenges We make ethical and sustainable decisions</p>
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1 POSITION PURPOSE:

- To ensure that the NDIS customer onboarding/claiming process and other financial administrative processes are managed effectively within the organisation
- To support DSA's purpose, vision and core values.
- To support DSA's Customer Service charter and objectives.
- Provide a service that supports the National Standards for Disability Service.

2 DUTIES / RESPONSIBILITIES

2.1 Financial On boarding Processes (Visicase and NDIS Portal)

- Determine customer's funding line and budget through NDIS plan and create Customer service plan. Calculate hours of support to be provided based on NDIA price guidelines. Translate customer goals into customer service plan. Send customer service plan to Participant Champion obtain customer consent and sign-off.
- Raise service bookings based on approved customer service plan in the NDIS portal.
- Amend, view or delete customer service bookings as requested by Participant Champion
- Create or update customer case files, case plans and funding amounts into Visicase



- Review and close current case files/case plans after all claiming has been completed and current NDIS plans have expired

2.2 **NDIS Claiming**

- Oversee the weekly claiming for customers with SIL and/or SDA funding. Pending service booking in portal, create re-occurring quick charges in Visicase
- Perform reconciliation as required to ensure all claiming is up to date.
- Adjust quick charges accordingly due to service halt or re-commencement.
- Approve created quick charges in Visicase on a daily basis or when due date arises
- Oversee clinical service claiming in Visicase
- Ensure funds available in portal and clinical claims are within current service plan period dates
- Ensure approved Clinical funding lines in Visicase/Portal matches to Clinical tracking service delivery. Alert Senior Clinician of discrepancies.
- Conducting regular reviews of customer service plans, NDIA portal bookings and claims to identify areas of concern
- Investigating and liaising with the NDIA to resolve missing revenue and rejected claims issues arising from discrepancies between Customer Service Plan and NDIA portal bookings. For clarity Operations retain responsibility for ensuring all services provided are fully claimed, ready for submission to NDIA portal or for FFS invoicing.
- Assist DSA's Business Operations with maintenance of NDIA Portal Service Bookings and handling of finance related customer issues including:
 - Changes to customer circumstances in the portal;
 - Customer exits to ensure final claims are made and outstanding debts collected
 - Lodging changes of customer circumstances in the portal
 - Processing final claims for customers who exit
 - Communicate Participant exits to DSA Accounts Receivable for follow up on cash collection
- Keeping NDIS portal rejections to a minimum and resolving claims rejections promptly with NDIA and Operational Divisions
- Provide a list of SIL income accruals & credits for overclaim at end of month, including Participant, Region, Dates, Amount, Cost Centre



2.3 **Ad-Hoc Financial Processes**

- Provide customer and funding information to Corporate Finance staff as required. Answer queries from Finance within the scope of this role.
- Investigate and identify funding amounts in the Portal as required
- Run report on service bookings remaining and send to Senior Psychologist on a monthly basis
- Run report on unclaimed monies for expired plans and send to Senior Managers for review
- Assist with response to and implementation of NDIS price increases to ensure claims are maximized at the correct rate
- Main point of escalation for finance related issues at operational sites

2.4 **General Administration**

- Act as back-up support to other administrative staff if required.
- Build relationships within business to facilitate effective partnering and support.
- Assist in providing inputs to developing an accurate and automated income accruals report via Visicase/BI360/GP

3. **WORKPLACE HEALTH AND SAFETY (WH&S) RESPONSIBILITIES**

- At all times work in a safe manner, and in accordance with DSA's WH&S policies, procedures and relevant work instructions.
- Report immediately to your reporting manager any hazards that may cause a risk in the workplace.
- Take immediate and appropriate action to eliminate any imminent risk observed in your workplace, and report the issue and action to your reporting manager.
- Observe safe systems of work and apply these to all employees, staff, contractors, service users and visitors to DSA premises and sites.
- Immediately report any injury sustained at work, or whilst journeying to or from work, to your reporting manager. Complete the on-line register of injuries.
- Process all notifications of injuries reported to you by within 48 hours, as outlined in DSA's WH&S Policy.
- Maintain an effective working knowledge of DSA's WH&S policies and procedures.

4. **OTHER**



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- Follow reasonable directions.
- Adhere to all DSA's policies, procedures, and relevant legislative requirements.
- Participate in meetings as required.
- Participate in performance reviews.
- Participate in staff training and development as required.
- Communicate openly with your manager regarding concerns or feedback.
- Undertake other duties as directed.

5. REQUIREMENTS

- Minimum 2 years' experience in a fast paced high volume environment in Accounts or Finance.
- Cert IV in Finance, Accounting or Business Administration (Desirable)
- Strong analytical, investigative and reconciliation skills
- High Level accuracy and competency in the NDIS price guide
- Intermediate to advance Microsoft Excel skills
- Understanding of the NDIS Provider Portal and processes
- Excellent customer service and communication skills.
- A current NSW Drivers Licence is a requirement of this role.
- NSW Working with Children Check
- Excellent interpersonal skills and a team player with ability to interact with Operational/Non- financial staff
- Ability to work with minimal supervision
- Strong time management and business partnering skills.
- Attention to detail and accuracy
- Ability to see the big picture while focusing on the process and procedures necessary to produce deliverables.
- Ability to meet and establish deadlines.

I, the undersigned, have read, understood and agree to the duties of Accounts Officer (Receivable) as contained in this job description.



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Printed Name

Signature

Date