



## Plan Manager

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Document type	Position description
Employment status	Permanent/Casual
Reports to	Customer Contact Centre Team Leader
Business line	Customer Experience Division

## The details.

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### The bigger picture.

This is a fantastic opportunity to be part of high performing, values based, proactive and customer-centric team. In this role, you will be connection point for Leap in! in the provision of exceptional customer service to Leap in! Members, NDIS Participants and/or their Plan Nominees, Support Coordinators and service providers on the National Disability Insurance Scheme.

### What you'll be doing.

- Guide and assist Members to understand and align with the NDIS guidelines for expenditure, including advice on what NDIS supports may/may not be claimed
- Support and coach Members to understand their NDIS plans and ensure services are aligned with their plan goals
- Resolve Member and service provider issues and invoice discrepancies
- Liaise directly with the L! Customer Accounts Team to ensure invoices are paid in a timely manner
- Manage incoming telephone, email and general correspondence
- Relay accurate content to our CRM system (ServiceNow), Leap in! App and internal systems
- Data entry and processing of provider invoices and client reimbursements (as required)
- Follow up on Member, Plan Nominee, Support Coordinator and service provider queries
- Escalate and respond to urgent client queries and matters with appropriate urgency, empathy and professionalism
- Provide general information on NDIS requirements/eligibility
- Sign up new Members to Leap in! plan management
- Support new Members and/or their plan nominees with their transition to the NDIS
- Look for opportunities to streamline services and find efficiencies
- Build relationships and partnerships with key stakeholders (including initiating three-way conversations with Members and the NDIA/other government agencies as appropriate to Member's needs)
- Maintain an understanding of L! operational standards as well as applicable policies and procedures including NDIS compliance, confidentiality and client rights
- Contribute to new initiatives, quality and activities as part of a continuous improvement process in your own work, team, Customer Experience division and across Leap in!
- Attend network expos and other important relationship-building events (from time to time as available)

## What does success look like?

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- You're meeting KPIs in the areas of adherence, quality, unplanned/unpaid leave and completion of training (supporting your personal learning and development pathway)

- You've developed positive and proactive relationships with your team and across the Leap in! Plan Management and Customer Accounts teams
- You support and contribute to our Leap in! culture and values.

## You'll be working closely with...

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### Leap in!

Team of Plan Managers  
 New Member & Retention Teams  
 Customer Contact Centre Team Leaders  
 Customer Contact Centre Manager  
 Chief Customer Officer  
 Leap in! Marketing, Operations, IT & Finance teams

### External

Leap in! Plan Management Members  
 Support Coordinators  
 Disability Supports Providers  
 National Disability Insurance Agency

## What you'll bring to the role.

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### You have...

- High level of customer service experience
- Warm and engaging telephone manner and presentation
- Ability to prioritise, organise and demonstrate initiative
- Ability to exercise empathy, understanding and confidentiality at all times
- Ability to work with a diverse range of customers and stakeholders, including people living with a disability, cultural diversity and language other than English, and be able to adjust ways of working to support best-practice inclusion and accessibility
- Exceptional communication skills (clear and concise written and verbal communication)
- Strong attention to detail
- Working knowledge of the National Disability Insurance Scheme Act 2013
- National Criminal History Record Check (Police Clearance), NDIS Worker Screening Check, and Working with Children Check
- Evidence of an approved ATAGI COVID Vaccination or a valid exemption from the relevant government health authority
- You may be required to undertake additional hours of work on an ad hoc basis

### You're...

- Positive with a can-do and solutions focused attitude
- Persistent and resilient
- Adaptable
- Hold a modern view of disability
- Looking for a role with a not-for-profit that has passion and purpose underpinned by commercial thinking.

### Supporting checks.

Employment with Leap in! is subject to satisfactory background checks which include:

- National Police Check
- NDIS Worker Screening Clearance & Blue Card
- Reference Checks

# About Leap in!

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## **Live the life you want to lead with Leap in! plan management.**

Leap in! is Australia's leading NDIS plan manager, supporting thousands of Australians across the country. As a not-for-profit driven by purpose, we put people first to provide a uniquely differentiated financial intermediary service for our Members.

Developed in consultation with people with disabilities, our end-to-end digital CX platform supports customers to manage the entirety of their NDIS administration in one place via a custom app and bespoke virtual claims and payment wallet.

Our digital platform is complimented by an innovative, omnichannel service model that simplifies the NDIS. Through information, strategies, connections and unique Member benefits, we enable people with disabilities to make the most of the scheme and to live their best life.

As an organisation, we celebrate our diversity and welcome all people regardless of ethnicity, faith, sexual orientation and gender identity.

We are proudly founding members of the *Inclusive Employment Movement*, members of the *Australian Network on Disability* and are committed to ensuring we are a *Child Safe, Child Friendly* organisation.

## **We offer...**

- An opportunity to play a key role in our growing NFP and purpose driven business
- Ongoing development and career advancement opportunities
- Competitive NFP salary packaging options via Access Pay <https://accesspay.com.au/salary-packaging/salary-packaging-calculator>
- Work-life balance with a hybrid model mixing the opportunity to work from our spacious light-filled office in the heart of Brisbane city and your own home
- Working within an organisation that has a positive impact on our Members and the wider community