**Position Description**

# Service Connect Officer

**Vision Australia - supporting people who are blind or have low vision to live the life they choose.**

## Purpose of Position

The purpose of this position is to provide a supportive and positive initial point of contact and engagement for clients and to establish and prioritise the client’s service needs through a supportive planning process. The role is required to provide consistent and high-quality intake and planning support to Vision Australia clients. The Service Connect Officer will provide intake and planning support to new and returning clients over the phone, and require an empathic and supportive skill set combined with a firm commercial mindset.

## Context

Vision Australia is a national, for purpose organisation that aspires to have a positive measurable impact on the lives of people who are blind or have low vision in the areas of education, employment, independence and social inclusion. The organisation is proactively transforming itself in response to major changes in our funding models and the expectations of the blind and low vision community.

This position sits within the Client Services group of Vision Australia. The group is responsible providing personalised services in Education, Employment, Independence and Social Inclusion (EEISI) through a trans-disciplinary model to three client groups: Children and young people (0-25 years) - Supporting child/youth and family goal achievement; Adult (26-65 years) - Supporting Individual goal achievement; and Older adults (65+ years) - Supporting Individual goal achievement.

## Principal Responsibilities

* Conduct professional phone-based intake and planning with new and returning consumers;
* Inbound and outbound calls, setting and completing follow up tasks in a queue in a timely manner;
* Use Salesforce based tools or client records to capture relevant client information accurately;
* Create relevant and accurate service agreements capturing client service need;
* Identify suitable funding and troubleshoot client funding source access, and support clients to understand the funding sources;
* Determine consumer funding and service need by employing motivational and appreciative enquiry;
* Create service bookings and purchase orders for multiple funding sources, both using internal and external systems;
* Develop and create Service Agreements;
* Conduct phone-based risk assessments for clients;
* Establish first service delivery appointment and ensure smooth and seamless transition of client from Intake & Planning to regional services. Similar handover support for clients with complex needs seeking regional support for Intake or Planning;
* Using a person centred, strength-based service approach, conduct service planning support for clients across all funding streams; from initial contact and service planning through to setting the first service delivery appointment;
* Understand, monitor and action referrals and requests within the MAC & NDIS portal;
* Support the administration of processing and billing requirements for funding sources including NDIS, HCPs, MAC, Job Access and DVA. Securing funds in line with the Service Agreement through service bookings or purchase orders with external providers or funding sources;
* May provide quotations for services and equipment, where required;
* Monitor NDIS and MAC funding access requests and follow up with clients to provide support or encouragement;
* Promote Vision Australia Services and Supports to consumers and/or their families or carers;
* Monitor and maintain outcome focussed, accurate, up to date client records in accordance with professional standards, Vision Australia policy and procedures and relevant legislation;
* Work collaboratively and proactively with service delivery staff to facilitate transdisciplinary, holistic services for Vision Australia clients;
* Other duties as required by the Client Induction and Service Planning Team Leader and Centralised Support Manager;
* Contribute to the maintenance of asafe workplace by ensuring staff, volunteers and clients receive adequate information, training and instruction on WHS. Contribute to the supervision to all persons on Vision Australia sites and events and ensure all safety issues are reported and addressed.

## Key Performance Indicators

Key performance indicators will be clearly defined through the performance planning process. These will include:

* Service Response Time – efficient and timely responses to consumer enquiries and first contact;
* Task resolution – setting and completing tasks, both for overall role and individual consumers;
* High accuracy of data entry;
* Quality Assurance benchmarks met.

## Essential Job Competencies

* Certificate IV in Disability or equivalent experience in community services with relevant specialist skills sufficient to perform required activities;
* Experience in case management, disability intake or service planning;
* Previous experience in working with people of all ages with disabilities in the community setting and providing client centred assessment and service delivery;
* Demonstrated planning, time management and coordination skills, including ability to prioritise and meet deadlines;
* Capacity to work independently and as part of a team;
* Knowledge and experience with funding sources and working to target. This includes negotiation, issue resolution and relationship development;
* Proficient in motivational interviewing and appreciative enquiry approaches;
* Commercial conversation skills, sales or call centre experience preferred;
* Strong analytical and problem-solving skills;
* Strong interpersonal and written communication skills, ability to set clear expectations and follow up on them;
* Customer Management Systems applications. Preferred experience in Salesforce, Netsuite, and/or Amazon Connect.
* Computer literacy skills in Microsoft applications.
* Ability to use database systems

## Organisational Values

The expectation that we set is that our workforce understands and models our values and behaviours in everything they do 100% of the time;

* Person-Centred - We measure our success in terms of outcomes for our clients;
* Accountable - We hold ourselves responsible for what we do and don’t do;
* Collaborative - We work well together and with others to deliver the best possible outcomes;
* Commercially Focussed - We work efficiently and responsibly to sustain and grow our services and influence;
* Agile - We will adapt, learn and innovate to have a positive impact in a changing environment.

## Vision Australia environment

Many Vision Australia employees work with Seeing Eye Dogs and all employees are likely to have contact with working dogs.

Employment is subject to the Organisation receiving a National Police Record Check and if relevant, a Working with Children Check or QLD Blue Card or Vulnerable Persons (ACT) check.

## Role Scope

**Reports to:** Service Connect Team Leader

Direct Report Staff: 0

Operating Budget: Nil