

Position Description

Position Title:	Plan Support Officer
Reporting To:	Manager – NDIS Supports
Direct Reports:	N/A
SCHADs Level:	4.1
Approved by:	Christopher Kowalski
Reviewed date:	24 August 2026

1. PURPOSE OF THE JOB

The Plan Support Officer provides support to participants to ensure their NDIS plans, funding arrangements, service agreements and associated information are accurately established, maintained and effectively utilised throughout their service journey with Crosslinks.

The role works collaboratively with participants, families, Support Coordinators, NDIS Planners and internal and external stakeholders to support changes to participant plans and service arrangements, monitor utilisation and assist participants to understand how their available funding can be used to access appropriate services and supports through Crosslinks.

The position also plays an important role in maintaining accurate participant information within organisational systems, supporting participants to access and navigate the Crosslinks Participant Portal, and working across Operations and Finance to support accurate service delivery, billing and claiming.

2. OUR PURPOSE

Crosslinks Inc. is a disability support service provider offering individuals with disability the support to access their community by embracing the vision statement of *'everyone should have a reason to smile'*.

3. OUR GUIDING PRINCIPLES



4. KEY TASKS AND MEASURES OF PERFORMANCE

KEY ACCOUNTABILITIES	INDICATIVE TASKS / MEASURE OF SUCCESS
Participant Administration, Compliance and Coordination	• Act as a key point of contact regarding participant plans, funding and service arrangements, communicating effectively with participants, families, Support Coordinators, NDIS Planners and other relevant internal and external stakeholders to clarify information, coordinate changes and support continuity of services for existing participants. • Maintain accurate participant documentation and records and support NDIS compliance, audit readiness and internal quality requirements. • Prepare, review, update and maintain service agreements for participants, including changes arising from new or amended NDIS plans, changes to supports or funding. • Prepare and calculate quotes for participant supports where required.
Participant Plan and Funding Management	• Maintain a strong understanding of Crosslinks services and support offerings, assisting participants and their families to understand how their available NDIS funding may be utilised to access appropriate Crosslinks services, consistent with their goals, funding and individual circumstances. • Review NDIS plans and funding arrangements to ensure agreed supports are correctly aligned with available participant funding. • Monitor participant plan and service utilisation, identifying under-utilisation, potential over-utilisation, funding risks and approaching plan/agreement end dates.
Participant Data and Systems Management	• Accurately establish and maintain participant NDIS plan, funding, service agreement and billable information within organisational systems/Flowlogic. • Maintain participant and operational records within organisational systems, including uploading and maintaining relevant documentation such as care/support plans.

	• Provide operational guidance to Scheduling regarding funding lines, billable supports and participant plan/service agreement information. • Maintain high standards of data integrity and accuracy to reduce downstream billing and claiming errors. • Identify recurring process/system errors and contribute to continuous improvement of plan administration, service agreement and funding processes. • Support participants and their families to access and use the Crosslinks Participant Portal, including assisting with initial setup, providing guidance on navigating the portal and helping them understand how to access relevant information and functionality.
Financial Management and Operational Support	• Work closely with Finance to investigate and resolve billing/claiming exceptions arising from participant plan, agreement or funding setup, while addressing the operational source of recurring errors. • Work proactively with Area Managers where utilisation is not tracking against agreed services, supporting appropriate follow-up and service planning. • Provide appropriate Plan Support knowledge/coverage across the NDIS Supports team and contribute to cross-training where required.

5. SELECTION CRITERIA

COMPLAINEE REQUIREMENTS	• NDIS Worker Screening Clearance • Valid Western Australian Drivers License • National Police Clearance • Valid Australian Working Rights
EXPERIENCE	• Experience in a NDIS, disability, community services, health or similar service environment. • Experience working and communicating with participants and relevant stakeholders in relation to funding, NDIS plans, service agreements and support arrangements. • Experience maintaining accurate participant records and documentation within organisational systems. • Experience using CRM systems, preferably Flowlogic or similar platforms and identifying system issues for continuous improvement.

	• Experience monitoring funding and service utilisation and identifying discrepancies, risks or upcoming plan/agreement end dates. • Experience supporting billing, claiming or resolving funding-related exceptions in collaboration with Finance or operational teams. • Experience working within environments requiring high levels of confidentiality, accuracy, compliance and data integrity.
SKILLS	• Strong administrative and organisational skills. • High level of attention to detail and commitment to data accuracy and integrity. • Strong understanding of funding calculations, service utilisation and financial information. • Ability to interpret NDIS plans, funding information, service agreements and support arrangements. • Strong systems and data management skills. • Strong analytical and problem-solving skills. • Strong written and verbal communication skills. • Ability to build effective working relationships with internal and external stakeholders. • Strong participant-centred approach. • Ability to work independently while contributing effectively to a collaborative team. • Ability to provide guidance and share knowledge with colleagues through coaching and cross-training.
KNOWLEDGE	• Knowledge of the NDIS, compliance needs, participant plans, funding structures, support categories and funding arrangements. • Understanding of how NDIS funding can be utilised to access appropriate supports in accordance with participant plans and individual circumstances. • Knowledge of service agreements, support arrangements, pricing, quotes and billable supports. • Understanding of participant plan and service utilisation, including under-utilisation, over-utilisation and potential funding risks. • Knowledge and understanding of accurate participant record-keeping, documentation and information management requirements. • Understanding of privacy, confidentiality and appropriate handling of participant information. • Knowledge of systems and processes used to manage participant plans, funding, service agreements and operational information.