

APRIL INFORMATION SESSION



ACCOUNTS: *What you need to know!*

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Note: The information in this PowerPoint is true and accurate at time of presentation (30/4/25) and is subject to change.

SESSION OVERVIEW:



TOPICS TO BE COVERED:

- Trilogy Care Accounts Team – Introduction
- Understanding Invoicing with Trilogy Care
- ITF, Services Australia,
- April updates

KEY TAKEAWAYS FOR CARE COORDINATORS:

- Gain insight into how Trilogy Care processes invoices, manages coordination payments, collects ITF and collaborates with Services Australia in administering the Home Care Package.

SESSION PROTOCOLS:

- Microphones and Cameras are on mute.
- If you have any questions, please use the chat function - this will be monitored by the team.



What is covered...

1. [Our ACCOUNTS TEAM](#)
2. [Invoices: what you need to know..](#)
3. [Income Tested Fees \(ITF\)](#)
4. [Termination](#) – What happens when a Care Recipients leaves Trilogy Care
5. [Coordination Payments](#)
6. [Takeaways](#)
7. [Updates & Feedback](#)

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THE ACCOUNTS TEAM

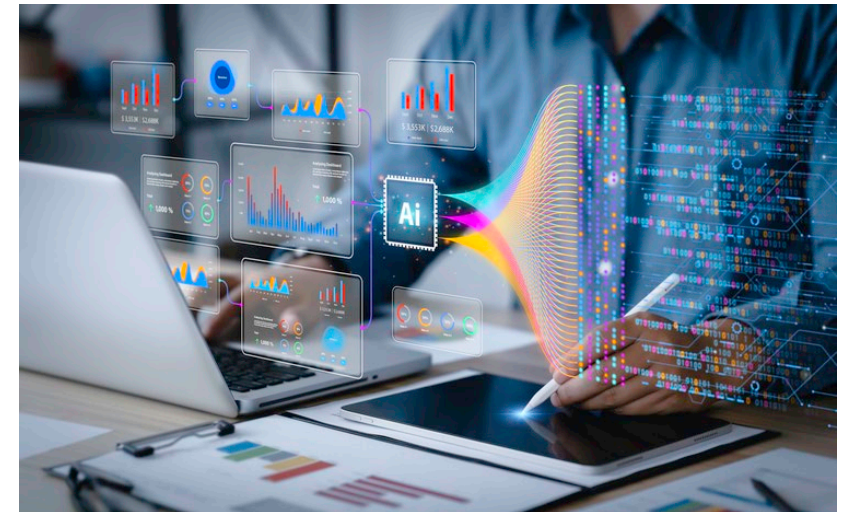


ACCOUNTS

Our Accounts team manages all financial operations tied to care recipients' Home Care Packages – covering everything from claims, payments, bill processing and coordination fees.

OUR TEAMS:

- **ACCOUNTS PAYABLE:** Process and pay care recipient bills
Processes invoices or reimbursements payable for care, services and equipment funded by home care package.
- **COLLECTIONS:** Income-tested fees (ITF)
Manages Care Recipients' ITF, a contribution assessed by Services Australia and attached to their Home Care Package (HCP).
- **CLAIMS TEAM:** Processes claims
Processes claims and calculates HCP fees, in addition to processing and paying coordination fees.
- **ACCOUNTS SUPPORT:** First point of contact for general account
Managing communication with our care recipients and providers regarding the accounts and ensuring queries are resolved.



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INVOICES

All you need to know...

JOURNEY OF AN INVOICE...

Invoice submitted via website or email

Invoice
submitted via
website or email

Draft invoice pending
approval from care
recipient or care
partner

Send to Billing
Supervisor for review
and final approval

Transfer into the
system, awaiting
Accounts Payable (AP)
review

Run pay batch and
process payment
through the bank

Remittance
advice sent!



Invoice EXAMPLE

<Company Name>

<123 Street Address, City, State,
Zip/Post>

<Website, Email Address>

<ABN: ABN number >

<Phone Number>



LOGO

INVOICE

BILL TO

<Contact Name>

<Client Company Name>

<Address>

<Phone, Email>

SHIP TO

Care Recipient's Name

Care Recipient's Address

Invoice No: #INV00001

Invoice Date: 11/11/11

Due Date: 12/12/12

DESCRIPTION	QTY	UNIT PRICE	GST	TOTAL
			10%	0.00
			GST Free	0.00
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
SUBTOTAL				0.00
DISCOUNT				0.00
SUBTOTAL LESS DISCOUNT				0.00
TOTAL GST				0.00

Thank you for your business!

Balance Due \$ -

Terms & Instructions

<Add payment instructions here, e.g: bank details, Bpay details>

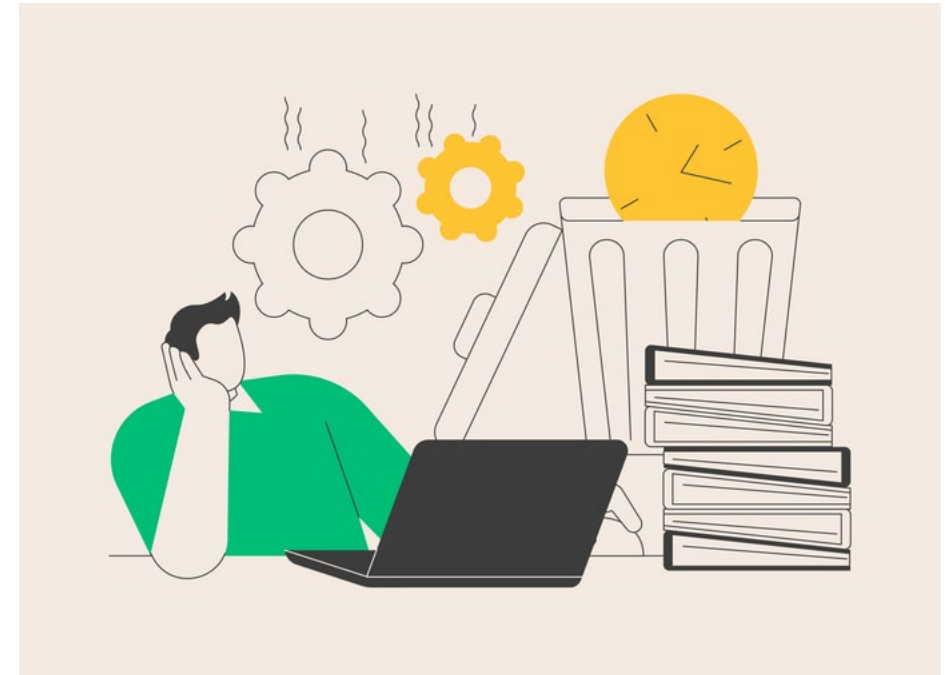
<Add terms here, e.g: warranty, returns policy...>

Coordinator Reimbursements:

Standard practice:

- Coordinators cannot seek reimbursement.
- The care recipient (or their representative) should make purchases directly, with reimbursement processed by Trilogy Care where applicable and approved through the correct procedures.

Care coordinators should not purchase items on behalf of care recipients unless approval has been sought and given (in writing) by either the Partnership/ Relationship Manager or Care Partner.



REMEMBER: Communication is key- **SEEK APPROVAL** and **WAIT** for **CONFIRMATION!**

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INCOME TESTED FEES
ITF...

UNDERSTANDING ITF attached to HCP



- All care recipients (CRs), including full pensioners, should have an income assessment completed or in progress before starting care.
- Full pensioners typically don't contribute, but pension details must be current with Services Australia.
- CRs can contact the Income Assessment Team at Services Australia on 1800 227 475.
- The ITF is a required consumer contribution and cannot be deducted from the Home Care Package (HCP).
- Non-payment of ITF may result in termination from Trilogy Care if the debt reaches \$2,500 or is 3 months overdue.
- A two-week notice will be issued prior to finalising any departure.

Remember to visit the your Resource page for information that can be given to care recipients

Resource Page

1



Coordinator partner
resources

Resources, guides,
training and marketing
assets

SEE MORE

2

Consumer Fact
Sheets

Fact sheets to provide to your care recipients

SEE MORE

Coordination Fact
Sheets

Informative resources for care coordinators

SEE MORE

Marketing Resources

Guides and assets to help market your business

SEE MORE

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Understanding
Home Care Packages

Information for your care recipients about aged care options, My Aged Care, and the assessment process

VIEW

Home Care Package
Providers

Information about Home Care Package providers

VIEW

Income Tested Fee
FAQ

Information regarding the Income Tested Fee

VIEW

Switching Providers

Information for care recipients about how to switch provider

VIEW

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Income Tested Fee (ITF) Information for Care Recipients

*Information sheet for Home
Care Package (HCP) recipients.*

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TERMINATION

What happens when a
Care Recipients leave
Trilogy Care?

Termination- What you need to know...

The **Care Recipient** may terminate their Home Care Agreement by providing 14 days written notice to Trilogy Care or an affiliated agent (e.g. Care Coordinator).

PROCESS:

- Care Recipient or Coordinator needs to contact the Care Partner ASAP
- Trilogy Care, will reach out to the CR to gain an understanding of why they want to terminate their HCA.

ACCOUNTS PROCESS at Termination:

- The Coordinator, needs to follow up with providers to ensure all **invoices** are **submitted** within **30 days** of the termination date – the sooner, the better!
- **Check** that all **service dates** on invoices are **before** the **termination date**
- **SERVICES PROVIDED AFTER TERMINATION CANNOT BE PAID** by Trilogy Care
- Trilogy loses access to HCP funds on the 70th day after termination. However, we cannot access to pay outstanding accounts after the 30th day.

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COORDINATION PAYMENTS

How it works...

COORDINATION PAYMENTS:

REMINDERS:

Trilogy Care relies on information from Services Australia to process monthly coordination fees.

- It is crucial to review and respond to correspondence about Declarations and RCTI within the timeframe specified in the email.
- If no active service was provided to a care recipient under their HCP during the month, the coordination fee will be reduced to 3%.
- If a Care Recipient takes 'leave' within the month, your coordination fee will be impacted.
- Trilogy Care aims for coordination payments to be processed by 21st day of each month (this is subject to Services Australia).

For any issues related to your coordination fees, please contact:

coordpayments@trilogycare.com.au

NOTE: RCTI -Recipient Created Tax Invoice

MONTHLY COORDINATION PAYMENTS: Process

1. Week prior to the end of the month – Trilogy Care sends Coordinators Declaration (see information on previous slide regarding process and expectations)

2. Trilogy Care receives claim from Services Australia (SA)

3. Trilogy Care cross checks data from SA with Care Recipient internal HCP activity.

4. Trilogy Care emails Coordinators RCTI invoice

5. Coordinators need to check RCTI when received. If a coordinator wants to dispute or question the RCTI an email needs to be sent to:

coordpayments@trilogycare.com.au

6. If correct: Trilogy Care aims to release coordination fees within 5 business days after the RCTI was emailed.

COORDINATORS RESPONSIBILITIES

 Recipient Created Tax Invoice

From - Recipient: Trilogy Care Pty Ltd
Address: Level 2, 2 King Street
Locality: Bowen Hills, QLD, 4006
ABN: 44 604 915 200

Date Issued: 23/04/2025
Period Start date: 1/09/2024
Period End Date: 30/09/2024

To - Supplier:
Address:
Locality:
ABN:
GST Registration Status: Registered

Service Description	Total Fee	GST	Total Fee (Inc GST)
Care Coordination Fees for the period from 01/9/24 To 30/9/24	\$ 2,770.30	\$ 277.03	\$ 3,047.33
Total of the invoice	\$ 2,770.30	\$ 277.03	\$ 3,047.33

Coordinator: a

Customer Name	Claim Amount	Receivable Coordination Fee (Sum of Coordination Fee)
David	\$ 3,269.75	11.00% \$ 366.43
Income Tested Fee Reduction	-\$ 64.50	11.00% \$ -
Level 3 Home Care Package	\$ 3,331.20	11.00% \$ 366.43
Qty/ad hoc	\$ 3.05	11.00% \$ -
Amy	\$ 1,530.60	11.00% \$ 168.37
Level 2 Home Care Package	\$ 1,530.60	11.00% \$ 168.37
Alex	\$ 5,049.90	11.00% \$ 555.49
Level 4 Home Care Package	\$ 5,049.90	11.00% \$ 555.49

CHECK YOUR RCTI:

- Review your RCTI details promptly, before the specified due date
- Check that Coordinator details are correct (e.g., ABN, GST status)
- Ensure all active care recipients are listed, with the correct HCP level
- Confirm the fee percentage is accurate for each care recipient
- If you believe any information is incorrect, email the Accounts Team via coordpayments@trilogycare.com.au
You may wish to CC your Partnership Manager
- Attach any relevant documents to support your query

COORDINATORS RESPONSIBILITIES

BANK DETAILS:

- Ensure the Bank Verification Form is completed before payment can be processed
- A secure form link can be requested from your Partnership Manager
- Once completed, the form will be distributed to accounts for processing
- Same process applies when updating bank details

GST:

- Notify your Partnership Manager if your GST status has changed or will change
- This ensures RCTIs reflect GST correctly
- A routine ABN check is conducted to verify GST status
- Notify us if your business name or registration details change



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TAKEAWAYS

KEY TAKEAWAYS

KEY MESSAGES:

- Double-check the portal for correct care recipient details
 - name, address, and other info
- Always include the care recipient's TCID (found in the portal) in correspondence
- Monitor your income – changes may affect your GST status
- If your GST status changes, notify your Partnership Manager immediately
- Communication is key – your Partnership Manager is here to support you
- Read all correspondence from Trilogy Care and respond by the due dates



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UPDATES and FEEDBACK

STAY CONNECTED



SUPPORT AT HOME:

Remember to register for our second webinar on
WEDNESDAY 14th May at 2pm AEST

[Register Here To Attend](#)

[Submit your Support At Home questions here!](#)

THE PORTAL: Have your say...

Your insights help shape the future of the Trilogy
Care Portal, guiding what we build next to better
support *you*.

[Portal Feedback Survey](#)

FOLLOW UP

We kindly ask that you take a moment to complete the evaluation via the link below.

[APRIL Information Session Feedback](#)



MAY INFORMATION SESSION:

Wednesday 28th May 2025



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Trilogy Care