

FEBRUARY 2026

INFORMATION SESSION

Building Confidence Under Support at Home

February 2026 Information Session

 The information in this presentation is true and accurate at time of presentation (25/2/26) and is subject to change.

WELCOME

SESSION BRIEFING

Session Protocols & Agenda

Microphones and cameras are on mute throughout the presentation.

Questions are welcome: please use the chat function, which our team will monitor actively.

01

Care Team Clarifications

AT-HM procedure, Budgets, Check-ins

02

Client Statements

Update and changes

03

Compliance

Supplier Support Initiative, Resources

04

Growth Team

Coordinator Loading Amendments, critical actions

05

Resources

Key resource links

1

CARE

AT-HM Process, Budgets and Check-ins

AT-HM Scheme Request Process

Assistive Technology & Home Modifications – Support at Home



STEP 1

Collection of Required Documentation

Coordinators must gather all necessary documents before forwarding to the Care Partner. Every AT-HM Scheme Request requires complete documentation.

- 1 Clinical Reports**
OT report or relevant Allied Health Professional report required for all identified 'under advice' and/or 'prescribed' ([AT-HM List](#))
- 2 Scope of Works**
Required for all Home Modifications requests
- 3 Two Quotes**
Required for Home Modifications (one quote for those in specific rural locations) and Assistive Technology where applicable
- 4 Proof of Ownership**
Mandatory for ALL Home Modifications
- 5 Completed ACA Form**
Mandatory for ALL AT-HM requests — no exceptions

STEP 2

Documentation Review

The Care Partner reviews all submitted documentation to ensure compliance before proceeding. Incomplete or non-compliant documentation will be returned for correction.

Review Checklist

- Reports are clinically appropriate and complete
- Recommendations align with Support at Home Guidelines
- Recommendations align with AT-HM List requirements
- Quotes are itemised and compliant
- All mandatory documents are included

Care Partner Responsibility

The Care Partner ensures all documentation meets requirements before submission to My Aged Care.



STEP 3

Approval

- 📄 **Home Modifications Only:** All Home Modification requests Team Leader approval and over \$20,000 require executive Your Care Partner will action this once submitted. Approval must be obtained before submission to My Aged Care (MAC).

No Home Modification requests are to be submitted without this approval.

STEP 4

Submission to My Aged Care

Once all requirements are met, the Care Partner submits the request via the MAC Portal.

01

Documentation Complete

All required documents received

03

Approval Obtained

Team Leader approval secured (if applicable)

02

Compliance Confirmed

Care Partner has reviewed and confirmed compliance

04

Portal Submission

Care Partner submits via MAC Portal and notifies Coordinator

STEP 5

Ongoing Updates

The Care Partner provides updates as they are received from MAC. This process is managed similarly to a Level Upgrade Request.

Approval

Notification when request is approved

Information Requests

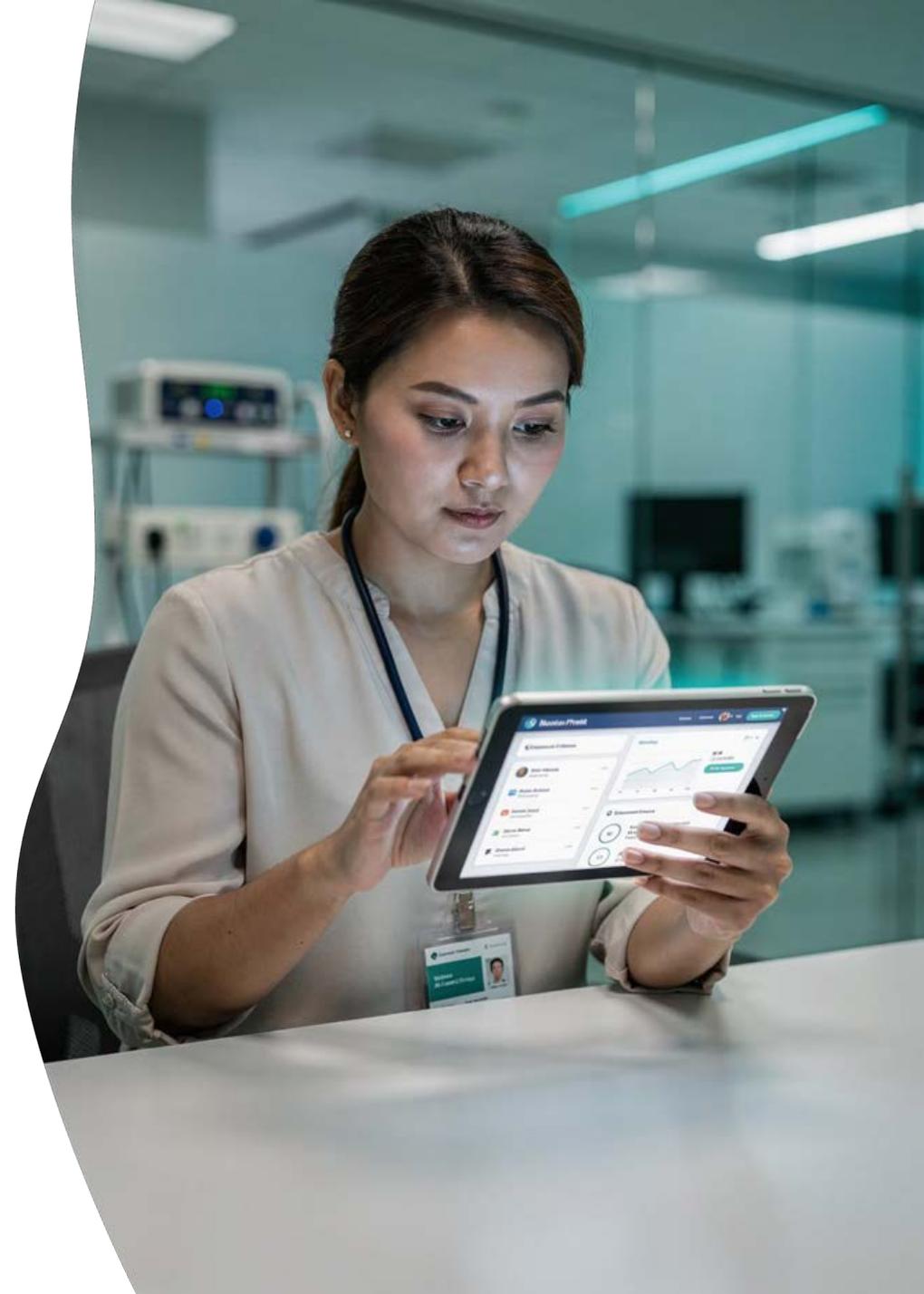
Further documentation may be required

Declines

Notification if request is declined

Amendments

Any required changes to submission



Completing the ACA Request Form

Things to remember:

- This form is also used for Upgrade requests in addition to the the Upgrade request form on your resource page
- Ensure correct spelling and DOB for the Client (referred to as Participant on the form)
- Agency Details = Trilogy Care
- Email completed form to your Care Partner

The Care Partner will complete Section 3 and lodge the request.

ACA: REQUEST FOR REVIEW OF SAH CLASSIFICATION OR AT-HM FUNDING TIER

The 'Increased - Level of Care' template has been developed for providers to complete, to provide evidence that will assist triaging the referrals for a review. NOTE: The form can be attached to the client record with the referral to ACA.

Note: The Assessor and/or the Assessment Delegate does not make decisions on priority category under the Act. Priority categories are assigned by the system (assessor portal).

Agency Details:			
Date	Click or tap to enter a date.		
Name of Referrer		Title	
Agency		Phone	
Referrer Email			

Participant Details:			
Participant Name			
DOB		Phone	
AC Number		Email	
Address			

Supporter Details:			
Supporter Name		Phone	
Type of Supporter	<input type="checkbox"/> Supporter <input type="checkbox"/> Supporter lite <input type="checkbox"/> Supporter guardian	Email	

Review Type:		
Select review type	<input type="checkbox"/> Transitioned HCP <input type="checkbox"/> SaH <input type="checkbox"/> AT <input type="checkbox"/> HM	Current Transitioned HCP Level: Choose an item. Current SaH Level is: Choose an item. Current AT Tier: Choose an item. Current HM Tier: Choose an item.

Consent	
Consent Provided by	<input type="checkbox"/> Participant <input type="checkbox"/> Supporter <input type="checkbox"/> Supporter lite <input type="checkbox"/> Supporter guardian

SAMPLE ONLY Page 1 of 3

Important Timeline Information

- ❏ **Client Communication:** Please ensure that clients are aware this process can take several weeks. AT-HM can only be actioned once approval approval and funding is approved and attached.

Setting proper expectations with clients about processing timeframes is essential for a smooth experience.



MAC TIMEFRAMES

Assistive Technology & Home Modifications Approval Times

10

Average Weeks

Standard processing time for AT/HM funding approval

17

Maximum Weeks

Longest approval timeframe currently experienced

AT/HM funding once submitted by Trilogy Care is taking on average 10 weeks for approval, with some applications taking up to 17 weeks.

Trilogy Care continues to follow up with MAC regularly to regularly to ensure these applications are actioned as as quickly as possible.

Level Upgrade Priority Guidelines

These timeframes help set realistic expectations with clients when submitting level upgrade requests through My Aged Care.



Coordinator Forms

[← Back](#)

New Care Recipient Onboarding Questionnaire
Onboarding questionnaire

[See More →](#)

Incident Reporting Form
Form for correctly reporting incidents

[See More →](#)

Package Level Upgrade Request Form
Form for requesting a Package upgrade

[See More →](#)

To apply for an Upgrade – complete and submit form on your Resource Page
REMEMBER: Talk to your Care Partner to ensure the client is well situated to meet criteria.

↶ RECAP

Last Month: Budget Management Improvements

In January, we covered key budget management improvements on the Portal. Make sure you revisit the January Information Session on your resource page if you need a refresher.



Remaining Balance

Locating your remaining balance on the Portal



Budget Utilisation

Understanding and managing the budget utilisation feature



Unplanned Services

Understanding unplanned services and the actions required as a coordinator



Transport Billing

Understanding how transport billing works within the budget

- ☐ Today we are looking at: managing at-risk budgets and the **new Inbox feature** that shows budgets requiring your attention.



⚠️ AT RISK BUDGETS

What Does an At-Risk Budget Look Like?

An **At-Risk budget** is where the **utilisation percentage exceeds 100%**. This means the planned services are **over the available quarterly subsidy**.

Step 1: Locate At-Risk Budgets

01

Portal Dashboard

Go to the Portal Dashboard

02

Budgets Section

Navigate to the Budgets section

03

Click "Inbox"

Open the new Inbox feature

Budgets inbox
You can prioritise budget planning here

Package stage: Active On-boarding Filter Package Classification Package level Budget status Risk

Package	Service Plan Status	In Review For	Care Partner	Classification	Care Option	Level	
AC-	Draft	-	Emily	Grandfathered	Self Managed PLUS	HCP 4	Review Plan
JL-	Draft	-		Grandfathered	Self Managed PLUS	HCP 4	Review Plan
M 07	Draft	-		Grandfathered	Self Managed PLUS	HCP 2	Review Plan
BR 08	Draft	-		Grandfathered	Self Managed PLUS	HCP 3	Review Plan
GS- 1	Draft	-		Hybrid	Self Managed PLUS	HCP 4	Review Plan

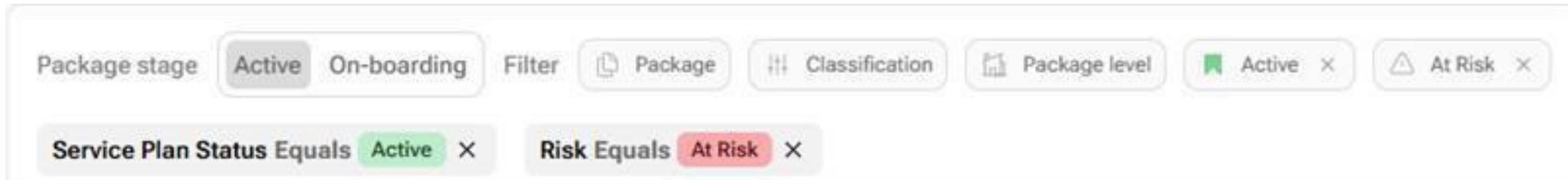
⚠️ **AT RISK BUDGETS**

Apply These Filters in the Inbox

Once in the Inbox, apply the following filters to surface at-risk budgets:

- Package Status: **Active**
- Risk Status: **At-Risk**

This will display all budgets that currently exceed 100% utilisation and require your immediate attention.





STEP 2

Review and Amend the Service Plan

1 Click Into Each At-Risk Budget

Open the budget to review the current service plan and projected spend.

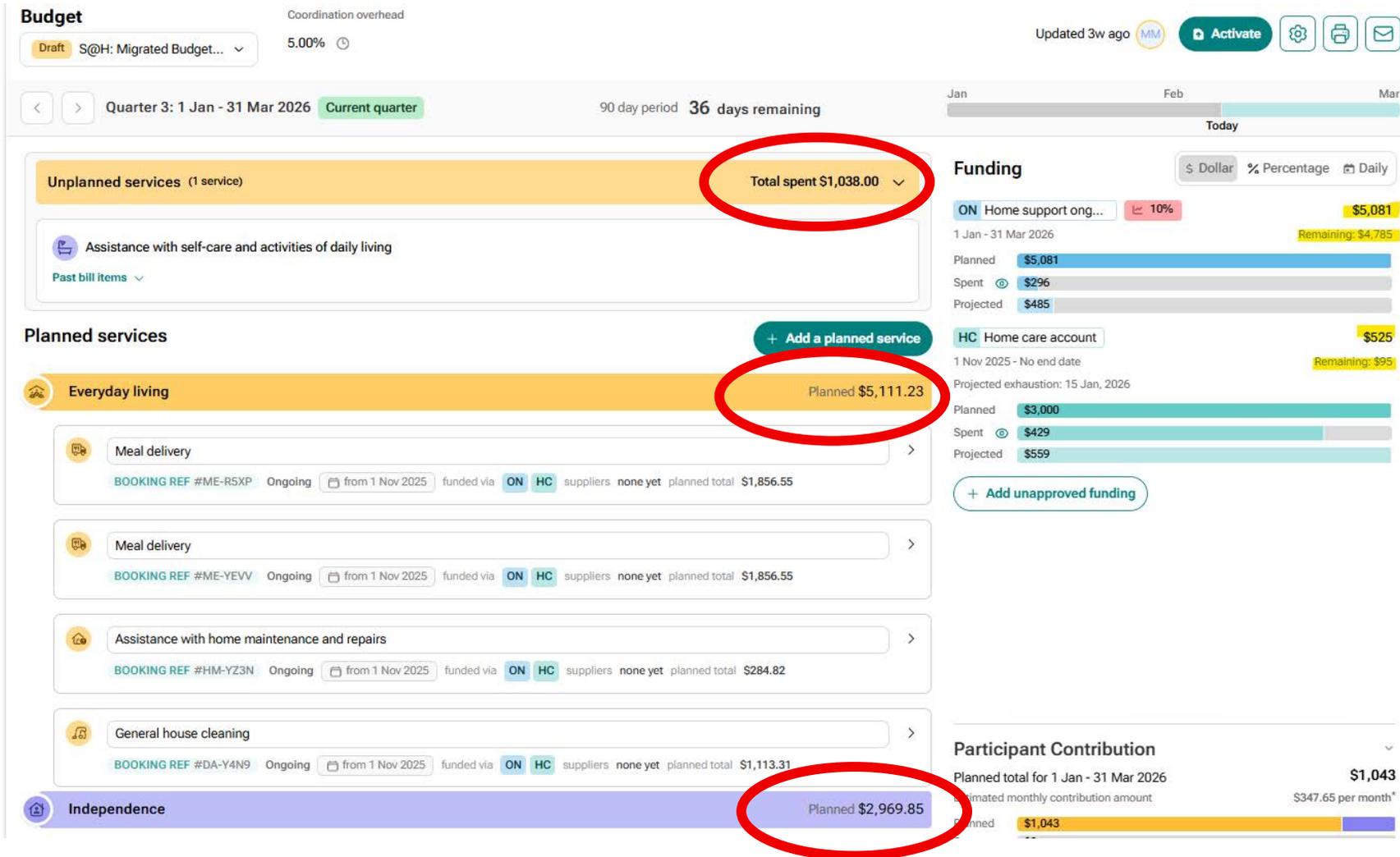
2 Edit Services

Adjust the services to ensure total expenditure aligns within the **quarterly subsidy limit**.

3 Confirm Utilisation Below 100%

Check the **right-hand side** of the service plan where it shows funding to verify utilisation is below 100%.

At Risk Budget Example:



Issues:

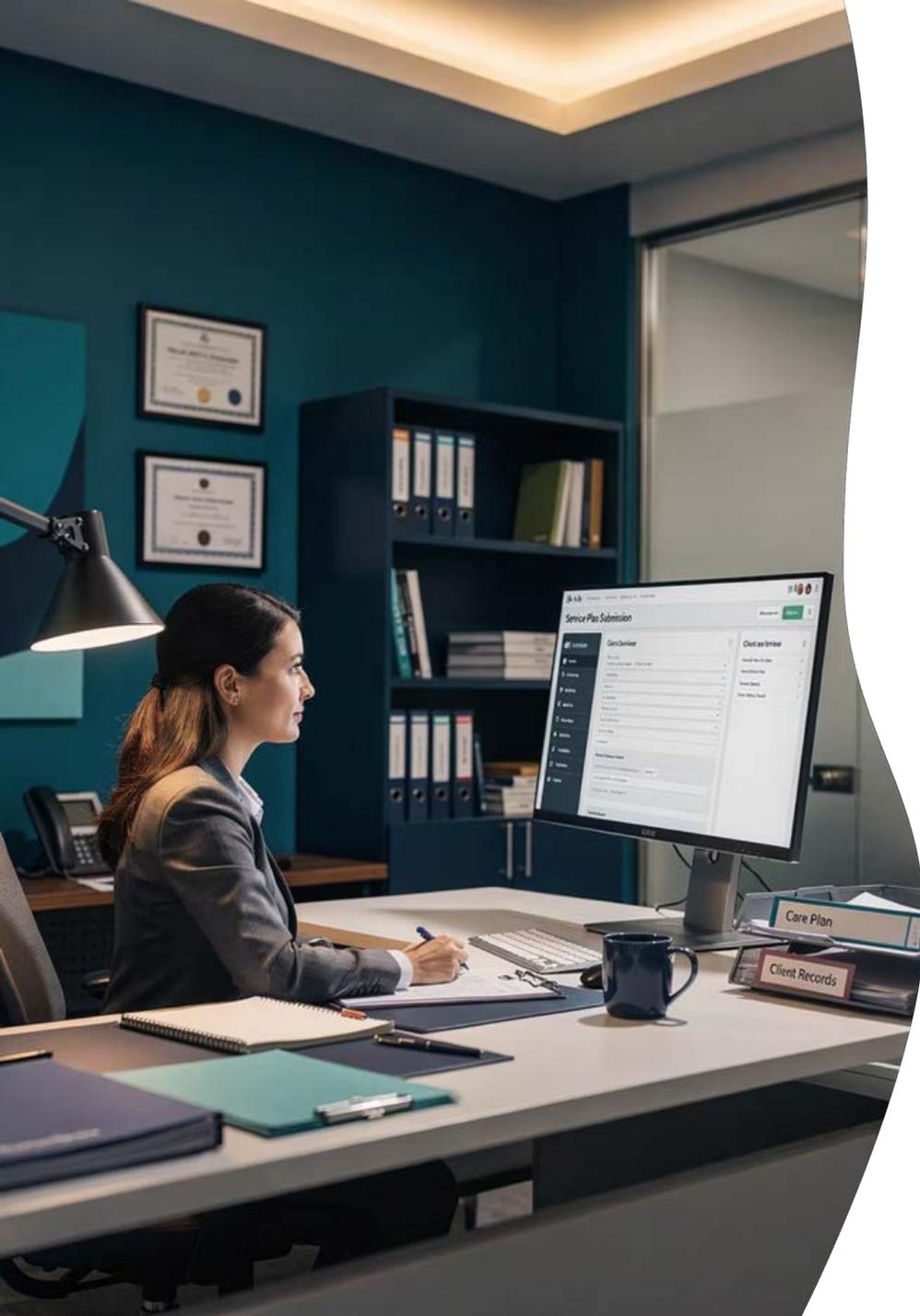
Unplanned spent + Everyday living + Independence = **\$9,119.08**

Available funding:
ON + HC = **\$5,606**

The client will go into overspend by **\$3,513.08**

Remember that loading fees are attached to hourly rates, which increases the amount coming from the budget

Supplier amount	\$6,975	Daily \$77.5
<input checked="" type="checkbox"/> All services	No supplier	\$6,975.00
	\$70 per hour, 15.5 hours every 2 weeks (weekdays)	\$77.50 x 90 days
+ Add rate card		
Coordination overhead fee	20%	\$1,395.00
Trilogy loading fee	10%	\$837.00
Service total		\$9,207



STEP 3

Submit for Care Partner Review



Click "Activate"

Once amendments are complete, click "**Activate**" to submit.



Care Partner Review

The updated service plan is automatically sent to your **Care Partner** for review.



Activation & Notification

If compliant, your Care Partner will activate the plan. You will receive an **approval notification** once finalised.

-  **Remember:** The goal is to bring all at-risk budgets back below 100% utilisation so planned services stay within the quarterly subsidy. Use the new **Inbox feature** regularly to stay on top of budgets that need your attention.

Reading the Portal Funding:

Planned: This is the total amount of services that have been scheduled or budgeted for the period.

Spent: This is the amount that has already been delivered and invoiced.

Projected: Based on bills approved this quarter if the client keeps spending the same average daily rate - this is the amount they would be projected to spend

Dollar: This shows everything in actual dollar amounts

Percentage: This shows how much of the total funding has been used as a percentage

Daily: This breaks the funding down into a daily budget rate across the funding period.

Funding

\$ Dollar % Percentage 📅 Daily

ON Home support ong... 57% **\$9,333**

1 Jan - 31 Mar 2026

Remaining: \$6,317

Planned **\$8,235**

Spent **\$3,016**

Projected **\$5,323**

HC Home care account

\$27,344

1 Nov 2025 - No end date

Remaining: \$20,173

Projected exhaustion: 18 Jul, 2026

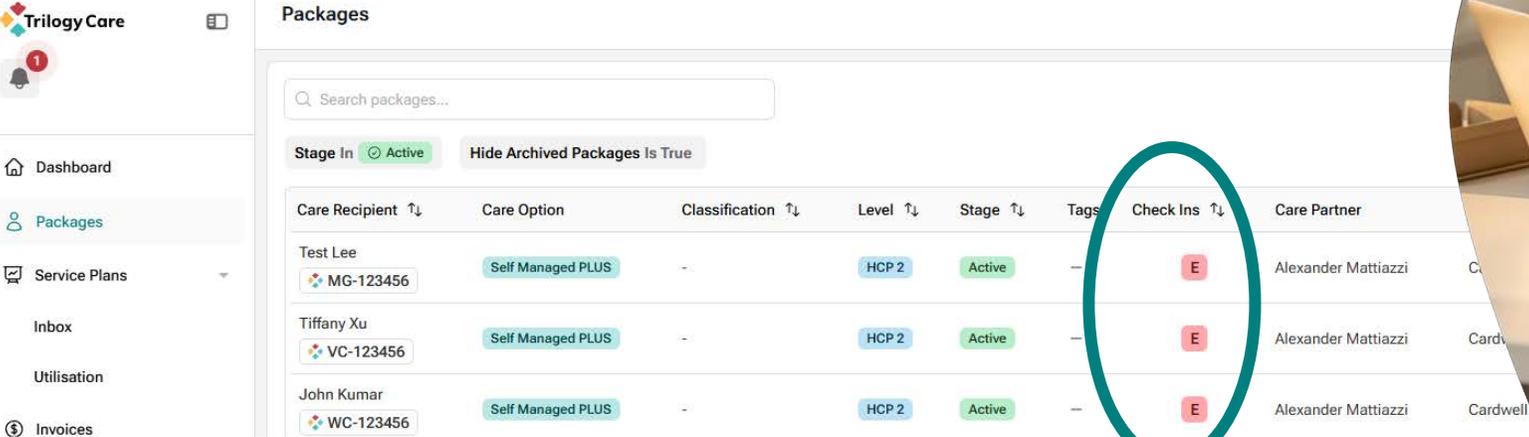
Planned **\$12,330**

Spent **\$7,171**

Projected **\$9,668**

Understanding Check-ins

A guide to the updated check-in process for Care Partners and Coordinators under Support at Home.



The screenshot displays the Trilogi Care software interface. On the left is a navigation sidebar with options: Dashboard, Packages (highlighted), Service Plans, Inbox, Utilisation, and Invoices. The main content area is titled 'Packages' and includes a search bar and filter buttons for 'Stage In' (Active) and 'Hide Archived Packages Is True'. Below this is a table with the following columns: Care Recipient, Care Option, Classification, Level, Stage, Tags, Check Ins, and Care Partner. Three rows of data are visible, each with a red 'E' icon in the 'Check Ins' column, which is circled in green.

Care Recipient	Care Option	Classification	Level	Stage	Tags	Check Ins	Care Partner
Test Lee MG-123456	Self Managed PLUS	-	HCP 2	Active	-	E	Alexander Mattiazzi
Tiffany Xu VC-123456	Self Managed PLUS	-	HCP 2	Active	-	E	Alexander Mattiazzi
John Kumar WC-123456	Self Managed PLUS	-	HCP 2	Active	-	E	Alexander Mattiazzi



What's Changed & Best Practice

UPDATED PROCESS

Previously, Coordinators asked clients four key questions every **two months**, covering health changes, home environment updates, satisfaction with support, and contact details. Under Support at Home, **Trilogy Care Care Partners** will now have a **touch point with every month with every month** with client in the form of a check-in, SMS or email.

Coordinators are still required to complete check-ins, though these can take the form of a **general update (check-in)** : capturing a client's ongoing development and status at specific intervals. Your Portal flags when a check-in is due, and all case notes can be lodged as an '**other note**' (case note).



Check-In Focus: Coordinators

- Client's progress with goals
- Actions taken & progress made
- Barriers identified
- Significant achievements or changes

Tips on Case Notes: Coordinators

- Keep notes **factual and concise**
- Record **ALL** communication — incoming/outgoing calls (including attempts), emails to/from clients or representatives and service providers
- Note information relevant to **risks** (client or environment)
- Log appointments/meetings attended
- Document referrals made

2

CLIENT STATEMENTS

Update...

Understanding SaH Client Statements

A comprehensive guide to reading and interpreting Support at Home client statements for coordinators and clients.

1 Financial Summary

Overview of ongoing support, funding streams and available funds

2 Quarter Spend Summary

Breakdown of support types and contribution percentages

3 Detailed Expenses

Detailed expense breakdown for the statement period

4 Monthly Contributions

Category breakdown and payment status information

5 Support Resources

Contact information and additional help





Mr John Smith
146 Carlton Parade
Carlton, NSW, 2218

Client name John Smith
My Aged Care ID 292262884
Trilogy client ID KC-231261

Section 1: Financial Summary

What You'll See

- Ongoing support details
- SaH classifications
- All funding streams
- Available funds
- Total funds (grand total)

Important: Remember that 10% has been deducted by the Government for Care Management. You don't see that amount as it has already been deducted before the statement is generated.

This is not an invoice – no payment is required

Financial summary

Ongoing Support at Home

Funding stream	Available	Spent this month	Spent quarter to-date	Remaining balance
Support at Home level 6 classification*	\$10,825.72	\$2,402.00	\$4,735.00	\$3,688.72
Supplements				
Oxygen	\$2,000.00	\$500.00	\$1,000.00	\$1,000.00
Rollover from previous quarter Capped at \$1,000 or 10%, whichever is greater.	\$1,200.00	\$0.00	\$1,000.00	\$200.00
Total	\$14,025.72	\$2,902.00	\$6,735.00	\$6,090.72

Other funds

Funding stream	Available	Spent/ Committed this month**	Spent/ Committed quarter to-date**	Remaining balance
Assistive technology Funding period 1 Nov 25 - 1 Jan 26.	\$4,358.60	\$886.50	\$2,152.92	\$2,205.68
HCP unspent funds	\$900.00	\$0.00	\$0.00	\$900.00
Total	\$5,258.60	\$886.50	\$2,152.92	\$3,105.68
Total funds	\$19,284.32	\$3,788.50	\$8,887.92	\$7,994.40

*This funding reflects your current allocation after a 10% deduction by the government for care management. The End-of-Life Pathway and the Restorative Care Pathway funding streams are exempt from this deduction. For these funding streams, care management and restorative care management are included within their allocated budget.

**Committed funds are AT-HM scheme costs that you have agreed to pay and the process of sourcing or installing the AT-HM items or services has started, however the items and services have not yet been delivered within the calendar month.



Section 2: Quarter Spend Summary

This section provides a breakdown of the type of support you are receiving against each of the categories.

It also shows the contribution percentage for each category as identified by Services Australia, helping clients understand their financial obligations across different support types.

UPDATED: from January Information Session

- Section name change




Monthly statement
November 2025

Quarter Oct - Dec

Quarter spend summary

🏠 Everyday living		Your active contribution rate is 17.5%		
Service	Total	Gov pays	You pay	
Domestic assistance				
Laundry services	\$113.40	\$93.55	\$19.85	
General house cleaning	\$330.00	\$272.25	\$57.75	
Meals				
Meal preparation	\$336.60	\$277.69	\$58.91	
Total	\$780.00	\$643.51	\$136.49	
🏠 Independence		Your active contribution rate is 5%		
Service	Total	Gov pays	You pay	
Personal care				
Assistance with self-care and activities of daily living	\$66.00	\$62.70	\$3.30	
Total	\$66.00	\$62.70	\$3.30	
🏥 Clinical supports		No contribution required		
Service	Total	Gov pays	You pay	
Nursing care				
Registered nurse	\$990.00	\$990.00	\$0.00	
Total	\$990.00	\$990.00	\$0.00	
Quarter to-date total		\$1,836.00	\$1,696.19	\$139.81

Section 3: Detailed Expenses

Understanding the Details

Shows a breakdown of every single expense in the statement month. month. Remember the Care Management cost comes from the 10% 10% deducted by the government

Asterisk (*) Symbol

Marks a service from a previous month being invoiced in this month's statement



Trilogy Care Monthly statement November 2025 Quarter Oct - Dec

Transactions by funding stream

Care Management

Date	Supplier	Description	Inv No.	Qty & rate	Total	Gov pays	You pay
25 Nov 25	Dave's Laundry	Helping John with the washing, drying and ironing on Friday after the operation.	856756	2 hrs at \$56.70/hr	\$113.40	\$93.56	\$19.84
25 Nov 25	Timble Pty	Assistance with self-care and activities of daily living*	234526	1 hrs at \$66.00/hr	\$66.00	\$62.70	\$3.30
18 Nov 25	Cookaborough	Ready to heat meals Mediterranean Summer Menu	134523	30 units at \$11.22	\$336.60	\$277.70	\$58.90
14 Nov 25	Care Vicinity Pty	Cleaning and gardening for John	482938	6 hrs at \$55.00/hr	\$330.00	\$272.25	\$57.75
29 Oct 25	Nursing Care	Registered nurse ongoing care for John*	23182	5 hrs at \$198.00	\$990.00	\$990.00	\$0.00
This period					\$1,836.00	\$1,696.21	\$139.79
Quarter to-date					\$4,735.00	\$4,310.69	\$424.31

Ongoing Support at Home

Date	Supplier	Description	Inv No.	Qty & rate	Total	Gov pays	You pay
25 Nov 25	Dave's Laundry	Helping John with the washing, drying and ironing on Friday after the operation.	856756	2 hrs at \$56.70/hr	\$113.40	\$93.56	\$19.84
25 Nov 25	Timble Pty	Assistance with self-care and activities of daily living*	234526	1 hrs at \$66.00/hr	\$66.00	\$62.70	\$3.30
18 Nov 25	Cookaborough	Ready to heat meals Mediterranean Summer Menu	134523	30 units at \$11.22	\$336.60	\$277.70	\$58.90
14 Nov 25	Care Vicinity Pty	Cleaning and gardening for John	482938	6 hrs at \$55.00/hr	\$330.00	\$272.25	\$57.75
29 Oct 25	Nursing Care	Registered nurse ongoing care for John*	23182	5 hrs at \$198.00	\$990.00	\$990.00	\$0.00
This period					\$1,836.00	\$1,696.21	\$139.79
Quarter to-date					\$4,735.00	\$4,310.69	\$424.31

Assistive technology

Date	Supplier	Description	Inv No.	Qty & rate	Total	Gov pays	You pay
25 Nov 25	Dave's Laundry	Helping John with the washing, drying and ironing on Friday after the operation.	856756	2 hrs at \$56.70/hr	\$113.40	\$93.56	\$19.84
25 Nov 25	Timble Pty	Assistance with self-care and activities of daily living*	234526	1 hrs at \$66.00/hr	\$66.00	\$62.70	\$3.30
18 Nov 25	Cookaborough	Ready to heat meals Mediterranean Summer Menu	134523	30 units at \$11.22	\$336.60	\$277.70	\$58.90
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This period					\$1,836.00	\$1,696.21	\$139.79
Quarter to-date					\$4,735.00	\$4,310.69	\$424.31

UPDATED: from January Information Session

- Section name change
- Colour coded legend that identifies contribution categories.

This colour-coded legend below identifies the applicable contribution categories

EL Everyday Living IN Independence CL Clinical supports 1of2 Item has been split across multiple line items

- New detail added: invoices / services that are attached to multiple categories will be shown as 1of2 , 2of2



Detailed Expenses

Care Management

Service details	Unit Type	Units
Care Management	Per Hour	4

Home Support Ongoing

Date	Supplier	Description	Inv No.	Qty & rate	Total	Gov pays	You pay
25 Nov 25	Dave's Laundry	Helping John with the washing, drying and ironing on Friday after the operation.	856756	2 hrs at \$56.70/hr	\$113.40	\$93.56	\$19.84
25 Nov 25	Timble Pty	Assistance with self-care and activities of daily living*	234526	1 hrs at \$66.00/hr	\$66.00	\$62.70	\$3.30
18 Nov 25	Cookaborough	Ready to heat meals Mediterranean Summer Menu	134523	30 units at \$11.22	\$336.60	\$277.70	\$58.90
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29 Oct 25	Nursing Care	Registered nurse ongoing care for John*	23182	5 hrs at \$198.00	\$990.00	\$990.00	\$0.00
This period					\$1,836.00	\$1,696.21	\$139.79
Quarter to-date					\$4,735.00	\$4,310.69	\$424.31

Home Care Account

Date	Supplier	Description	Inv No.	Qty & rate	Total	Gov pays	You pay
14 Nov 25	Care Vicinity Pty	Cleaning and gardening for John	482938	1 hrs at \$55.00/hr	\$55.00	\$0.00	\$55.00
This period					\$55.00	\$0.00	\$55.00
Quarter to-date					\$55.00	\$0.00	\$55.00

*Service delivered in a previous month and processed this month.

This colour-coded legend below identifies the applicable contribution categories

EL Everyday Living IN Independence CL Clinical supports 1of2 Item has been split across multiple line items

Section 4: Monthly contribution summary

A breakdown of contributions in every category. If a client does not pay does not pay contributions, the section will show: "You have no contributions payable."

This could be due to being grandfathered or only accessing clinical services.

 **Outstanding Contributions:** If a client has outstanding contributions, this is identified with an invoice number and and current status.

Important: Remind clients that communication is key. If they are having difficulties paying contributions, they need to speak to Trilogy Care.



Monthly statement
November 2025

Quarter Oct - Dec

Monthly contribution summary

Invoice No.	Contribution categories	Spent this month	Your rate	You pay
048392	Everyday living	\$780.00	17.5%	\$136.49
	Independence	\$66.00	5%	\$3.30
	Clinical supports	\$990.00	0%	\$0.00
Total contributions				\$139.81

Outstanding contribution invoices

Invoice No.	Invoice date	Due date	Customer reference	Paid status	Amount due
048392	1 Dec 25	15 Dec 25	UTF25000032011	Awaiting payment	\$139.81
031416	1 Nov 25	15 Nov 25	UTF25000032010	16 days overdue	\$369.72
Total amount due					\$509.53

Due to bank processing times (generally up to 48 hours), payments made close to the end of a statement period may not be reflected until the following statement.

Voluntary contributions

Invoice No.	Date	Contribution categories	Spent this month	Your rate	You pay
058438	24 Oct 25	Voluntary contributions	\$0.00	100%	\$500.00
Total contributions					\$500.00

Section 5: Additional Support Resources

This final section provides clients with helpful contact information to support them with any questions or concerns about their statements.

To support you further, Trilogly Care will provide a video shortly designed to support clients' understanding of their statements. We will also make this available to coordinators.



**Monthly statement
November 2025**

Quarter Oct - Dec

For more support

Please call or email us if you have any questions regarding your statement or would like to discuss financial or hardship support options:
Phone: **1300 459 190** | info@triloglycare.com.au | www.triloglycare.com.au/contact

Independent Advocacy

If you have questions or concerns about your aged care, including Support at Home costs and fees, you can speak to an aged care advocate by calling the Aged Care Advocacy Line. Provided by the Older Persons Advocacy Network (OPAN), this free and confidential service is independent of both government and aged care providers, and will connect you with a local advocate in your state or territory.

Aged Care Advocacy Line: **1800 700 600**
Monday to Friday - 8:00am to 8:00pm & Saturday - 10:00am to 4:00pm
Website: www.opan.org.au

Translation Services

If you need assistance in understanding this statement in other languages, you are welcome to access free translation services.

Call: **131 450** 24 hours, 7 days a week
Website: www.tisnational.gov.au

Complaints & Whistleblower Reports

We are committed to safe, high-quality aged care and supporting your right to raise concerns.

If you are unhappy with any aspect of our services, please speak with a staff member or contact us:
Phone: **1300 459 190** | info@triloglycare.com.au | www.triloglycare.com.au/contact

Complaints are treated seriously, confidentially, and anonymously if you wish. You may also contact the Aged Care Quality and Safety Commission directly **1800 951 822** | www.agedcarequality.gov.au.

If you become aware of serious misconduct, reporting is encouraged and protected under law. Confidential Whistleblower Reports can be made to the Protected Disclosures Officer:

"Speak Up" Whistleblower & Protected Disclosures
Level 3, 2 King Street
Bowen Hills QLD 4006
Phone: 1300 598 813

Our Complaints and Whistleblower policies are available on request or at www.triloglycare.com.au.

Coming Soon Statement Resources:

Trilogy Care will email Coordinators a links to:

- Pdf – Reading your monthly statement
- Video- Understanding Your Monthly Statement

These two documents will also be provided to clients.



Reading your monthly statement

This guide aims to help you understand how to read your Trilogy Care monthly statement.

At the top of your statement, you'll see a QR code (1), which you can scan at any time to access your statement online, and your personal details (2).

Financial summary

This section gives you a snapshot of your overall account position, for both ongoing Support at Home funds (3) and other funds, like AT-HM and HCP unspent funds.

It shows the available funds you started with, what was spent this month and this quarter to date, and your remaining balance at the end of the month.

The screenshot shows the top of a monthly statement for November 2022. It includes a QR code (1) and personal details (2). Below this is a section for 'Financial summary' with a sub-section for 'Ongoing Support at Home' (3). The table below shows the following data:

Account name	Start of month	Spent this month	Spent to date	End of month
Support at Home - Personal Care	\$ 1,150.00	\$ 1,150.00	\$ 1,150.00	\$ 0.00
Support at Home - Clinical Care	\$ 1,150.00	\$ 1,150.00	\$ 1,150.00	\$ 0.00
Total	\$ 2,300.00	\$ 2,300.00	\$ 2,300.00	\$ 0.00

The screenshot shows a 'Current spend summary' table with the following data:

Category	Start of month	Spent this month	Spent to date	End of month
Current spend	\$ 1,150.00	\$ 1,150.00	\$ 1,150.00	\$ 0.00
Independence	\$ 1,150.00	\$ 1,150.00	\$ 1,150.00	\$ 0.00
Clinical care	\$ 1,150.00	\$ 1,150.00	\$ 1,150.00	\$ 0.00
Other funds	\$ 1,150.00	\$ 1,150.00	\$ 1,150.00	\$ 0.00

Quarter spend summary

Here you'll see how your spending has tracked against your current quarterly budget, broken down by service category (Everyday living, Independence, and Clinical care).

It shows how much has been used so far this quarter and what remains, if any. It also shows your contribution rate for each service category; Everyday living (4), Independence (5), Clinical care (6).



3

COMPLIANCE

Compliance Update

SUPPLIER SUPPORT INITIATIVE

We're launching a comprehensive outreach program to stabilise operations and support our supplier network during the post-reform transition period.

Scope

Targeted outreach to to approximately **12,000 suppliers** across our network

Focus Areas

- Rejected and on-on-hold invoices invoices
- Documentation issues
- Missing or incorrect pricing setup on the Portal

Delivery

- 25 dedicated staff staff members
- Data-led outreach strategy
- 1:1 supplier education



Goal: Reduce invoicing delays, decrease rejections, and rebuild supplier confidence during post-reform hypercare.





Key Resources & Next Steps

Supplier Knowledge Hub

Your primary source for guidance and education resources

Step-by-step invoice requirement guides

Detailed billing walkthroughs and tutorials

Compliance documentation documentation templates

 **Important:** Direct all suppliers to the Knowledge Hub as the single source of truth

Moving Forward



Proactive Support

Education-first approach prevents issues before they arise



Measurable Impact

Fewer rejections, faster processing, better outcomes



Stronger Network

Building supplier confidence and operational stability



What This Means for You

Expected Benefits for Coordinators:

-  **Fewer Invoice Rejections**
Proactive supplier education reduces submission errors
-  **Faster Processing**
Streamlined workflows mean quicker quicker payment timelines
-  **Reduced Back-and-Forth**
Clear guidance minimizes repetitive repetitive supplier questions
-  **Stronger Compliance**
Enhanced supplier understanding leads to better adherence

Your Critical Role:

- 01
Reinforce Messaging
Maintain consistent communication aligned with Project Onion guidance
- 02
Direct to Resources
Point suppliers to the Knowledge Hub for Hub for accurate information
- 03
Flag Issues Early
Identify and escalate recurring problems problems for systemic resolution



4

GROWTH

Jay Pery
Team Leader- Business Development

Coordinator Payments Update

JANUARY 2026

December Payments Complete

All December coordinator payments have been successfully processed and distributed. The final reconciliation has been completed, allowing us to move forward with client statements.

January 80% Paid

The first tranche of January payments (80%) has been released to all coordinators. The remaining 20% will follow standard processing timelines once validation is complete.

Client Statements Ready

With December claims finalised, we're now preparing client co-contribution notices and statements. These documents will be distributed to clients in the coming week.

Coordinator Loading Amendments: Individual

Budget settings

Budget name: budget 1

This will be displayed to the recipient

Planning period
You're planning for a partial period that has 86 days in period.

Coordination overhead
Trilogy default (20%) Coordinator default (20%) Custom: 28.00

Everyday living contribution rate (%): 0.00
Independence contribution rate (%): 0.00
Clinical contribution rate (%): 0.00

The clinical contribution rate is always 0% in Support at Home

Buttons: Delete plan, Cancel, Duplicate, Save changes

Budget (Coordination overhead)

Activated 7h ago [Edit] [Cog] [Print] [Email]

Funding

	\$ Dollar	% Percentage	Daily
ON Home support ong...		0%	\$13,520
5 Jan - 31 Mar 2026 [Edit]			
Planned	\$2,816		
Spent	\$0		
Projected	\$0		
HC Home care account			\$26,000
5 Jan 2026 - No end date [Edit]			
Planned	\$0		
Spent	\$0		
Projected	\$0		

+ Add unapproved funding

Participant Contribution

Planned total for 5 Jan - 31 Mar 2026: \$0
Estimated monthly contribution amount: \$0.00 per month*

Click the 'cog' icon in a budget

Coordinator Loading Amendments: Global/ Default

Dashboard

Packages

Budgets

Invoices

Organisation

Team

Accounts

Pending Fees

Fees

Coordinator Loading
20%

Assistive Technology Loading
5%

Home Modification Loading
5%

Edit

What do these mean?

Edit Fees

Approval by Care Management required

Select default Coordinator Loading fee

20%

Apply new fee rate to **new clients only**

Apply new fee rate to new clients and existing as well

Reason for rate change *

Please enter text here...

2. Scroll down and click edit

3. Apply changes and save – care partner approval IS required

1. Click Organisation

Coordinator Loading Amendments – What You Need to Know!



Amendment Submitted

All coordinator loading amendments and coordinator profile amendments follow a standardised timeline.



Effective Next Month

Changes are processed and become effective from the first day of the month following submission, ensuring consistency and proper planning for both coordinators and finance teams.

Amendment Effective Date Policy

To maintain accurate payment processing and prevent mid-month adjustments, all coordinator amendments—whether loading adjustments or profile changes—will take effect on the 1st day of the following month after submission.

Example: An amendment submitted on 15 January will become effective on 1 February.



Critical Action Items & Deadlines

Client Recontracting Deadline

28 February – Final Date

- 1 All clients must complete their recontracting process by 28 February. Failure to meet this deadline will result in automatic termination of services. Please prioritise outstanding recontract agreements immediately.

Trilogy Agreement Signatures

- 2 Every new client onboarding requires a signed Trilogy Agreement—either digital or verbal confirmation. **A valid client email address is mandatory** for onboarding processing and future communications.

Quarter 3: Satisfaction Surveys

- 3 Quarterly satisfaction surveys will be distributed towards the end of Q3. of Q3. These surveys provide valuable feedback on coordinator performance and client experience, helping us continuously improve our improve our service delivery.

5

RESOURCES

Thank you

We appreciate your participation and engagement throughout our session today. A copy of this presentation will be uploaded to your Resource Page in the next week

To help us enhance future sessions, we kindly ask that you complete our brief feedback survey.

[Complete Feedback Survey](#)



We look forward to seeing next month-

Save the date...

March 25th at 12pm AEST

Essential Resources for Support at Home Implementation

Access comprehensive tools and expert guidance to navigate the transition to Support at Home with confidence. Our resource hub provides everything coordinators need for successful implementation.



Expert Q&A Sessions

Watch our founder James Whitelaw and Executive Team address frequently asked questions in two comprehensive video sessions, providing clarity on complex implementation issues.



Calculation Tools

Utilise our purpose-built calculators: the Coordinator Calculator for planning support packages and the Client Quarterly Calculator for tracking client progress and budgets.



Comprehensive Resource Hub

Access transition materials, previous webinar recordings, case study videos, and implementation guides—all centralised for your convenience.

Quick Links

[Support at Home Hub](#)

[Coordinator Calculator](#)

[Client Quarterly Calculator](#)

Remember to check out resources on:

[Supplier Hub](#)

[Trilogy Care Website](#)

[Coordinator Resource Page](#)

Additional Support Resources



Restorative Care Pathway

Support to regain independence and function:

- [My Aged Care — Restorative Care Pathway](#)
- [My Aged Care — Should I Apply?](#)

Contact your Trilogy Care Partner for personalised guidance.



End-of-Life Pathway

Compassionate support during life's life's final stages:

- [Fact Sheet for Healthcare Professionals](#)
- [Application Form](#)
- [Support at Home Programme](#)



Independent Advocacy

Free, confidential support to speak up for your rights:

- [Older Persons Advocacy Network \(OPAN\)](#) — 1800 700 600
- [Aged and Disability Advocates \(ADA\) — \(ADA\)](#) — 1800 818 338

[Services Australia](#) offers aged care specialists for financial hardship assistance.