

From Statements to Strategy: Kicking off 2026 with Clarity



JANUARY
INFORMATION
SESSION



Note: The information in this PowerPoint is true and accurate at time of presentation (28/1/26) and is subject to change.

Session Protocols

To ensure a smooth and productive session, please note the following guidelines:

- **Microphones and cameras** are on mute throughout the presentation
- **Questions are welcome** – please use the chat function, which our team will monitor actively

WELCOME

Luke Traini- Trilogy Care CEO



Agenda

1. **Care Team Updates:** Budgets, MAC timeframes and transport changes

- [Budget Management](#)
- [MAC Timeframe](#)
- [Transport Changes](#)

2. **Client Statements:** Understanding SaH statements in detail

3. **Compliance:** Invoice Guidelines

- [Quarter – End Invoice Submission Guidelines](#)
- [Invoice Requirements & Guidelines](#)

4. **Growth Team:** Funding streams and coordinator payments

5. **Takeaways, Resources and Feedback**



1

CARE

Budgets, timeframes and transport

Scott Roberts
Care Team Manager- External



Starting with Care

Three critical updates to support your coordination work

Budget Management

Enhanced utilisation tracking and remaining balance visibility

MAC Timeframes

Current approval timelines and priority priority guidelines

Transport Changes

New billing requirements under Support at Home

Budget Management Improvements

The screenshot shows the 'Budget' section of the 'Package Details' page. On the left, a sidebar displays basic client information: Gender (Male), DOB (- 74 years old), and Monash Classification (MMM) 2. The 'Remaining balance by funding stream' section is highlighted with a yellow circle, showing ON \$8,307.05 and HC \$23,411.44.

Budget (Quarter 3: 1 Jan - 31 Mar 2026, Current quarter, 90 day period, 64 days remaining)

Unplanned services (3 services)

- Gardening: Total spent \$668.07
- General house cleaning
- Meal preparation

Funding

- ON Home support org... (Planned \$6,206, Spent \$1,026, Remaining \$8,307)
- HC Home care account (Planned \$0, Spent \$0, Remaining \$23,411)

Planned services

Everyday living (Planned \$3,599.31)

- Gardening (BOOKING REF: Ongoing, from 16 Dec 2025, funded via ON suppliers, planned total \$1,042.04)
- General house cleaning (BOOKING REF: Ongoing, from 12 Dec 2025, funded via ON suppliers, planned total \$2,205.92)
- Meal delivery (BOOKING REF: Ongoing, from 12 Dec 2025, funded via ON suppliers, planned total \$351.35)

Clinical supports (Planned \$415.71)

- Podiatry (BOOKING REF: Ongoing, from 12 Dec 2025, funded via ON suppliers, planned total \$344.92)

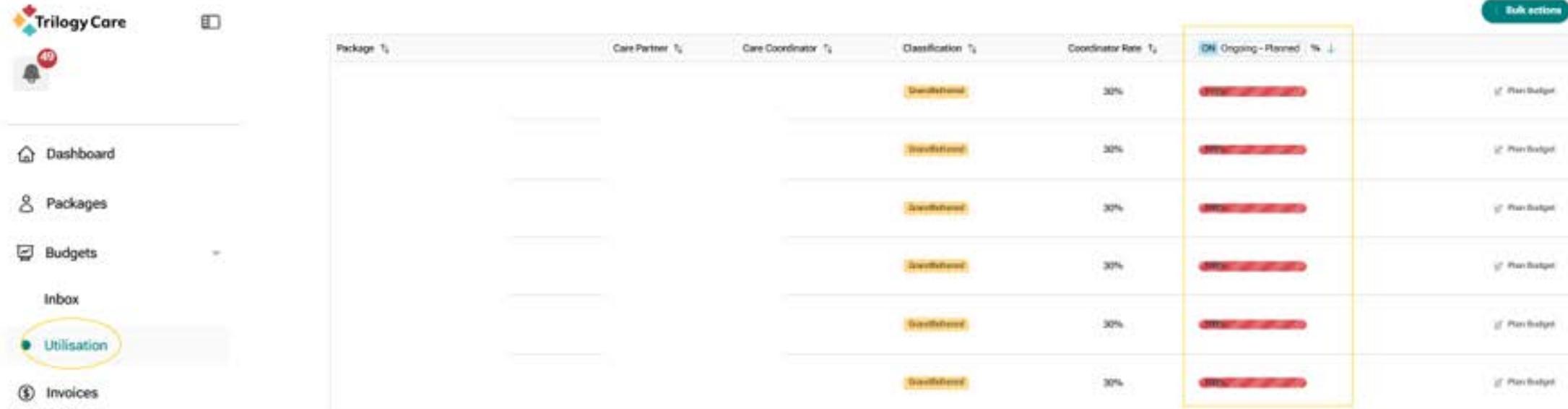
Print care plan

Key Changes

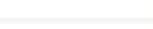
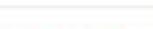
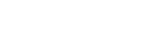
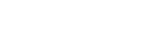
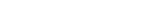
Budgets now display "remaining balance" so coordinators can better manage funds and know accurate numbers. This is pertinent for unspent funds usage and tracking spending progress across the quarter.

Note: This only relates to processed processed invoices and will not take into take into consideration unpaid invoices invoices or on hold/ rejected bills.

Budget Management Improvements



The screenshot shows a software interface for Trilogy Care. On the left is a sidebar with navigation links: Dashboard, Packages, Budgets, Inbox, Utilisation (which is highlighted with a yellow circle), Invoices, Organisation, Team, Accounts, and Pending Fees. The main area displays a table with columns: Package, Care Partner, Care Coordinator, Classification, Coordinator Rate, and Ongoing - Planned (%). Each row shows a 30% utilization rate. A 'Bulk actions' button is located in the top right corner of the table area.

Package	Care Partner	Care Coordinator	Classification	Coordinator Rate	Ongoing - Planned (%)	Actions
1	1	1	1	1	30%	                                      <img alt

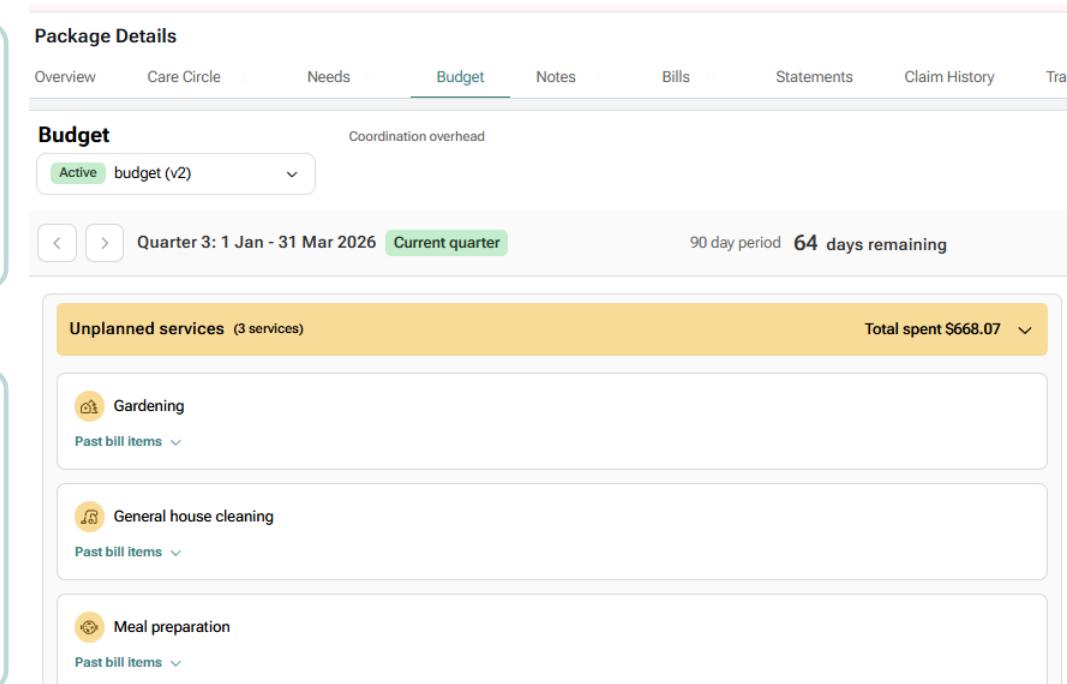
Understanding Unplanned Services

What Are Unplanned Services?

Services which are outside of the budget but are under \$1,000. These are paid to prevent on-hold bills and ensure providers are paid promptly.

Coordinator Action Required

Coordinators will need to determine if these are ongoing services or once-offs once-offs and amend the budget accordingly to maintain accurate financial financial tracking.



The screenshot shows a software interface for managing care packages. The top navigation bar includes 'Overview', 'Care Circle', 'Needs', 'Budget' (which is selected), 'Notes', 'Bills', 'Statements', 'Claim History', and 'Track'. Below this is a 'Budget' section with a dropdown menu showing 'Active budget (v2)'. The date range is set to 'Quarter 3: 1 Jan - 31 Mar 2026' with 'Current quarter' selected. A status bar indicates a '90 day period' with '64 days remaining'. The main content area is titled 'Unplanned services (3 services)' with a total spent of '\$668.07'. It lists three services: 'Gardening' (with a house icon), 'General house cleaning' (with a broom icon), and 'Meal preparation' (with a bowl icon). Each service entry includes a 'Past bill items' link.

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 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.

TRANSPORT CHANGES

Important Transport Billing Changes

- Critical Change:** Providers cannot invoice for kilometres directly under Support at Home.

Direct transport can only be charged **per trip**, not per hour. The fee for the service may service may depend on the distance travelled, but cannot be charged "per kilometre". "kilometre".

Across Support at Home, prices for services include in-scope delivery costs such as such as labour, transport, consumables and admin. This supports including reasonable reasonable provider travel time and costs as part of delivering many services where services where relevant, not as a separate add-on line item.





When Transport Billing Is Acceptable



Acceptable

Transport is integral to the activity and included in the service description



Not Acceptable

Transport billed as a separate separate line item or charged charged per kilometre

Key Principle

Transport can be legitimately part of delivering support *when it's integral to the activity*, but it cannot be billed separately.

If the bill refers to transport or travel, but it is not charged separately, that is acceptable!

2

Support at Home CLIENT STATEMENTS

Tiffany Whitelaw

Partnership Liaison Manager- Compliance and Partnerships

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 Budget Spend Summary

Breakdown of support types and contribution percentages

3 Transactions by Funding Streams

Detailed expense breakdown for the statement period

4 Monthly Contributions

Category breakdown and payment status information

5 Support Resources

Contact information and additional help





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.

Mr John Smith
146 Carlton Parade
Carlton, NSW, 2218

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

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	\$2,000.00	\$500.00	\$1,000.00	\$1,000.00
Oxygen				
Rollover from previous quarter	\$1,200.00	\$0.00	\$1,000.00	\$200.00
Capped at \$1,000 or 10%, whichever is greater.				
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	\$4,358.60	\$886.50	\$2,152.92	\$2,205.68
Funding period 1 Nov 25 - 1 Jan 26.				
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.

trilogycare.com.au

1300 459 190 | info@trilogycare.com.au



Section 2: Budget 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.

Budget spend summary

Everyday living				Your active contribution rate is 17.5%		
	Your budget	Spent quarter to-date	Remaining			
Domestic assistance						
Laundry services	\$691.24	\$341.44	\$349.80			
General house cleaning	\$2,412.99	\$1,191.89	\$1,221.10			
Meals						
Meal preparation	\$2,052.00	\$1,013.58	\$1,038.42			
	Total	\$5,156.23	\$2,546.91	\$2,609.32		
	Government pays	\$2,101.20				
	You pay 17.5%	\$445.71				
Independence				Your active contribution rate is 5%		
	Your budget	Spent/Committed quarter to-date	Remaining			
Personal care						
Assistance with self-care and activities of daily living	\$402.80	\$198.96	\$203.84			
Assistive technology	\$4,358.60	\$2,152.92	\$2,205.68			
	Total	\$4,761.40	\$2,351.88	\$2,409.52		
	Government pays	\$2,234.29				
	You pay 5%	\$117.59				
Clinical supports				No contribution required		
	Your budget	Spent quarter to-date	Remaining			
Nursing care						
Registered nurse	\$6,034.41	\$2,980.68	\$3,053.73			
Nursing care consumables	\$3,047.59	\$1,505.35	\$1,542.24			
	Total	\$9,082.00	\$4,486.03	\$4,595.97		
	Government pays	\$4,486.03				
	Quarter to-date total	\$18,999.63	\$9,384.82	\$9,614.81		

Section 3: Transactions by Funding Streams

Understanding the Details

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

Asterisk (*) Symbol

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

Transactions by funding stream

Care Management

Service details	Unit Type	Units
Care Management	Per Hour	4

Ongoing Support at Home

Date	Service details	Invoice No.	Qty & rates	Total	Gov pays	You pay
25 Oct 25	Jims Laundry Laundry services*	856756	2 hrs at \$56.70/hr	\$113.40	\$93.56	\$19.84
30 Oct 25	Wesley Mission QLD General house cleaning*	675756	4 hrs at \$99.00/hr	\$396.00	\$326.70	\$69.30
17 Nov 25	Gourmet Dinner Meal preparation	322446	30 units at \$11.22	\$336.60	\$277.70	\$58.90
22 Nov 25	Mable Assistance with self-care and activities of daily living	090677	1 hr at \$66.00/hr	\$66.00	\$62.70	\$3.30
25 Nov 25	Anglicare Registered nurse	674538	5 hrs at \$198.00/hr	\$990.00	\$990.00	\$0.00
28 Nov 25	Air Liquide Healthcare Nursing care consumables	876556	8 units at \$62.50	\$500.00	\$500.00	\$0.00
			This period	\$2,402.00	\$2,250.66	\$151.34
			Quarter to-date	\$6,735.00	\$6,310.69	\$424.31

*Transaction from a prior period.

Assistive technology

Date	Service details	Invoice No.	Qty & rates	Total	Gov pays	You pay
8 Nov 25	LifeTec Australia Bimanual handrim-drive wheelchair	987356	1 unit at \$715.00	\$715.00	\$679.25	\$35.75
8 Nov 25	Trilogy Care Assistive Technology Coordination Fee	675756	1 unit at \$71.50	\$71.50	\$67.93	\$3.58
Committed	Wrap-around services - Set up and training		1 unit at \$100.00	\$100.00	\$100.00	\$0.00
			This period	\$886.50	\$847.18	\$39.33
			Quarter to-date	\$6,735.00	\$6,310.69	\$132.50

Section 4: Monthly Contributions

A breakdown of contributions in every category. If a client 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 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	\$846.00	17.5%	\$148.05
	Independence	\$952.50	5%	\$47.63
	Clinical supports	\$1490.00	0%	\$0.00
Total contributions				\$195.68

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	\$195.68
031416	1 Nov 25	15 Nov 25	UTF25000032010	16 days overdue	\$369.72
Total amount due					\$565.40

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



Monthly statement
November 2025

Quarter Oct - Dec

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

To support you further, Trilogy Care will provide a video shortly designed to support clients' understanding of their statements.

We will also make this available to coordinators.

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@trilogycare.com.au | www.trilogycare.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@trilogycare.com.au | www.trilogycare.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.trilogycare.com.au.

3

COMPLIANCE

Zoe Judd

General Manager- Partnerships and Compliance

Quarter-End Invoice Submission Guidelines

CRITICAL DEADLINE

30-Day Submission Window

All invoices must be submitted within 30 calendar days after the quarter end to ensure Trilogy Care is able to process them. For example, the Q2 deadline (first quarter of the Support at Home program, Nov-Dec 2025) is January 30, 2026.

30

Calendar Days

For submission after quarter end

30/01/2026

Q2 Deadline

Example: January 30, 2025

Early submission is strongly encouraged to avoid any payment issues.



Invoice Requirements & Guidelines

Complete Invoice Requirements

1. **Service Date Documentation:** Clearly state specific dates services were rendered.
2. **Rate Verification:** Confirm billed rates align with contracts and fee schedules and price lists in Portal.
3. **Itemised Breakdown:** Provide detailed list of services names, frequency, units and costs across separate line items.
4. **Supporting Documentation:** Attach all necessary authorisations, shift/case notes, or proof of delivery.

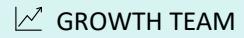
Common Issues That Cause Delays

- Missing Service Dates
- Rate and unit swapped
- Insufficient Detail in Descriptions
- Incorrect Transport Billing (eg, billing for travel separately)

4

GROWTH

Jay Pery
Team Leader- Business Development



Growth Team Updates

Coordinator Payments

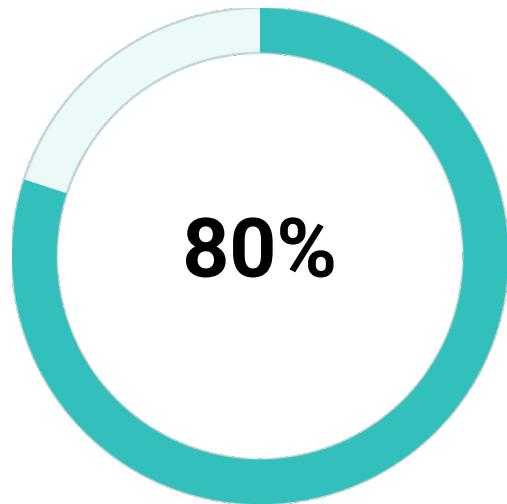
Background on claiming process and December payment status

Additional Funding Streams

New funding stream onboarding and MSO requirements

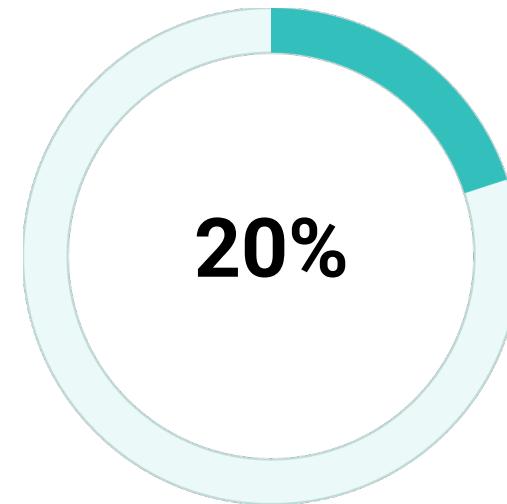


Coordinator Payments: December Update



Processed

December payments completed



Pending

Awaiting claim acceptance

Payment Process

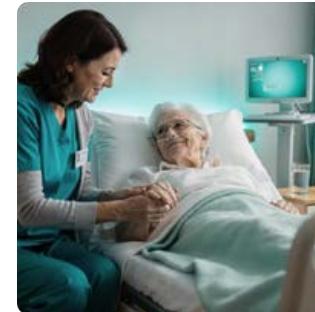
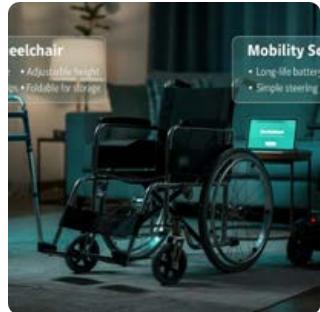
Trilogy Care submits claims to Services Australia usually in the 3rd week of the month for the preceding month.

If this claim isn't accepted by Services Australia, Trilogy cannot confirm coordinator payment amounts, hence the recent split payments.

The remaining 20% of December payment will be made once the December claim has been accepted by Services Australia.

Additional Funding Stream Onboarding

My Aged Care is allocating additional funding streams for clients outside core SaH funding. These include Minimum Service Offering (MSO) at 60% of Offering (MSO) at 60% of full funding amount for specific services.



Assistive Technology

Equipment and devices to support independence

Home Modifications

Physical changes to improve home safety

Restorative Care

Short-term support to regain independence

End of Life

Specialised support during final stages

Important: Trilogy Care IS accepting clients with these additional funding streams as long as the client's core funding has been approved. Please advise clients if they are unsure of their funding stream. For example, clients might ONLY have AT/HM funding available, so will not be able to receive services until their core SaH funding is allocated to them.

5

TAKEAWAYS
RESOURCES
FEEDBACK

Additional Support Resources



Restorative Care Pathway

Support to regain independence and function:

- [My Aged Care — Restorative Care 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.

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

[Coordinator Resource Page](#)

[Support at Home Hub](#)

[Coordinator Calculator](#)

[Client Quarterly Calculator](#)

Featured Content

From Confusion to Clarity Series:

- [Part 1: with James Whitelaw, Trilogy Care Founder](#)
- [Part 2: with Marko Rukavina, Chief Financial Office, Trilogy Care](#)

Case Studies Video Series

Thank You for Attending Our 2025 Information Sessions

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...

February 25th at 12pm AEST