

Growing Together

Monthly Coordinator Information Session

May 27, 2026 · 12:00pm AEST



Today's Agenda

TRILOGY CARE

01

Welcome & Housekeeping

Nadia Rivkaris

3 min

02

Growth: What we're taking action on & future growth strategies

Nick Lunn, Jay Pery & Baden Crathern

10 min

03

Partnerships & Compliance: New initiatives to have your say & budget utilisation

Zoe Judd



04

Care: Check-ins, AT-HM, requests, and communication

Aimee Koman

15 min

05

Portal: What's new?

Nadia Rivkaris

5 min

06

Wrapping Up

Nadia Rivkaris

3 min

01

Welcome & Housekeeping

Nadia Rivkaris

Partnerships Liaison Manager

Nadia | Partnerships Liaison Manager

Joining us today are...

- Nick | Chief Growth Officer
- Jay & Baden | Team Leaders – Business Development
- Aimee | Team Leader – Care

How to participate

- Webinar is presentation style – you'll remain on mute and with cameras off, but we encourage you to use the Q&A function to ask us your questions!
- Trilogy Team are on standby to answer your questions live
- We'll get through as many questions as we can, *but may not be able to answer all of them*

Resources

- Slides will be published on the Coordinator Resource Page after today's session
- FAQ will be compiled and made available also!

02

Growth

What we're taking action on & future growth strategies

Nick, Jay & Baden

The aged care landscape and what it means for your clients

234,900

Australians in the queue

Approved or awaiting assessment right now

4.99M

Australians aged 65+ today

Growing by ~125,000 every year

32,000+

new packages confirmed

2026-27 federal budget

16,000+

Trilogy Care active packages

Across coordinated & self-managed clients



Who is waiting right now

- 107,000 approved clients still without a funded package
- 128,000 more waiting just to be assessed
- Even with 80,000 new places released this year, the queue has barely moved

Sources:

- <https://population.gov.au/data-and-forecasts/projections>
- <https://population.gov.au/sites/population.gov.au/files/2026-01/2025-population-statement-age-sex-national.xlsx>
- <https://www.theweeklysourc.com.au/aged-care-sector-leaders-react-to-budget-2026-27/>
- <https://www.agedcareguide.com.au/talking-aged-care/australias-home-care-waitlist-hits-record-highs-...>
- <https://www.thesenior.com.au/story/9247082/mps-providers-call-for-urgent-action-as-aged-care-wait-times-hit-one-year>
- <https://insideageing.com.au/the-support-at-home-queue-keeps-growing-while-the-government-gives-no-indication-it-can-meet-demand/>



What is changing for them

- 32,000+ new packages releasing in 2026-27
- From Oct 2026: showering, dressing & personal care become fully govt-funded
- These changes make the value of a package more tangible than ever for our clients



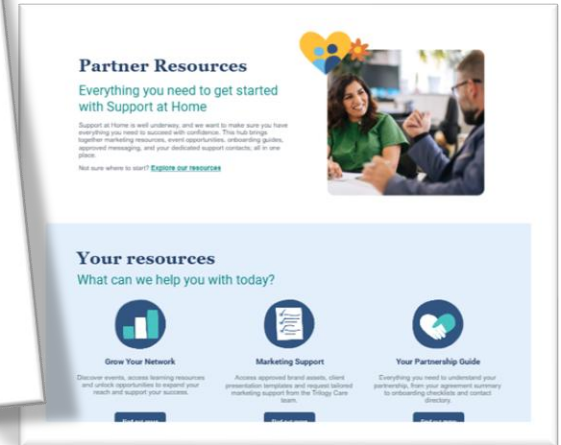
How you can help them and your business

- Newly activated clients need a trusted coordinator
- Use the Oct 2026 changes as a genuine reason to reach out to prospects
- Trilogy supports 16,000+ clients across coordinated & self-managed care
- Talk to your Relationship Manager or Partnership Manager we're here to help build the strategy

Marketing Resources for Coordinators

Sneak Peek!

- Our Partner Marketing Resources Page revamp is almost complete!
- Grab our marketing support resources, submit cobranded brochure requests, and keep up to date with industry events in your area
- Still to come – Coordinator handbook. A one stop shop on all of your "how to's!"



Business Development | Jay

We've Heard You — Updates in Progress

Partnership Support Officers

- Lia and Oliver have joined our team, to help support YOU with invoicing and compliance queries

Statements update

- Statements for January, February and March have now been sent

Client approval process on raising fees

- Clients need to approve increases in coordination fees
- Speak with your partnership manager on how to ensure that this change is lodged effectively within portal
- A new and improved portal dashboard is coming for this!

Portal newsletter

- Watch this space! We're working diligently to create and provide a portal newsletter, based directly from our portal release notes

Budget Training — Coming Soon

What is the issue?

- Budget training is an ongoing point of discussion within Trilogy Care and our Coordination Partners

How will this be delivered?

- A dedicated budget planning training session is being planned for coordinators, with a dedicated resource for this!

What will it cover?

- Crucial portal functionality for day-to-day budget amendment and ownership
- How to navigate portal functionality changes

04

Care

Check-ins, AT-HM, requests, and communication

Aimee

Care

Aimee Koman | Care

Check-Ins

Two scheduled touchpoints for every client.

CARE PARTNERS

4 months

between client check-ins

CARE COORDINATORS

2 months

continuing as usual

Aimee Koman | Care

Refresher

Four reminders for our Care Coordinators.

0 1 **ATHM requests**

Require 2 quotes, a report, a completed ACA form, and — for home modifications — a Scope of Works plus proof of home ownership.

0 2 **Budgeting responsibly**

When submitting budgets for care partners to review, ensure they do not exceed the client's available funds — otherwise the budget is at risk and the client overspends.

0 3 **Care coordinator & care partner meetings**

An important opportunity to speak with your care partner over Teams and ask questions.

0 4 **Cab Charge cards & meal requests**

Include the budgeted monthly rate. For Cab Charge, note whether the client needs a digital or physical card — if physical, we can issue an interim digital card.

05

Portal Update

What's new?

Nadia

Portal | Nadia

01 Check-In Dashboard

Check-In views are temporarily switched off but the new dashboard is on its way!

Coming soon

A dashboard showing who is due, overdue, and done — at a glance from your Packages tab.

Our approach

Rolling out internally first to iron out issues, then to you.

Next step

We'll keep you updated as your rollout approaches.

Everything behind Check-Ins is still running — only the view is temporarily off.

02 Recipient in Care Circle

What changed and why it matters:

Previously

Each recipient email had to be unique across all clients. Two recipients sharing an email caused an error — requiring a manual workaround that was time-consuming and confusing.

Now

Recipients now sit inside the Care Circle alongside all other contacts. The same email can be used across multiple recipients — no workarounds, no errors.

Portal | Nadia

03 Report Issues & Suggestions

We want your feedback — send it directly from within the Portal using the Help Centre icon.

1

Locate the Help Centre icon in the bottom-left corner of the Portal.

 Help Center

2

Click to open the support chat window.

3

Follow the prompts and submit your ticket.

Your feedback goes directly to our development team for investigation and prioritisation. What you say makes a difference!

04 Statements Now Downloadable

Client statements for January, February, and March have been sent by email or post. Copies are also available to download directly from the Portal.

✓ January

✓ February

✓ March

How to access

Package → Billing → Statements → Download

Profile

Care Plan

Services

Billing

Notebook

ory

Contributions

Statements

Portal | Nadia

In Summary...

01

Check-In Flags

Check-In views are temporarily switched off while we roll out a smarter dashboard — showing who is due, overdue, or done at a glance from your Packages tab.

02

Recipient in Care Circle

Recipients now live in the Package Care Circle. The same email address can now be used across multiple recipients — no workarounds needed.

03

Share Feedback & Issues

Use the Help Centre icon in the bottom-left of the Portal to open the support chat and submit a ticket directly to our team.

04

Statements Downloadable

January, February, and March statements are available to download now under Billing & Statements. Clients were also sent copies by email or post.

?

Your Questions: Answered

Growing Together, May 2026

Q

What's happening with the reclassification of Personal Care services?

A

My Aged Care published this update on 27 May 2026 with the planned changes and impacts: <https://www.myagedcare.gov.au/news-and-updates/support-home-personal-care-contribution-changes>

Q

Where can I enquire about my Thin Market Grant application?

A

Please direct your enquiries to tmg@trilogycare.com.au

Q

How can I or my clients ask a question or lodge a dispute about their statement?

A

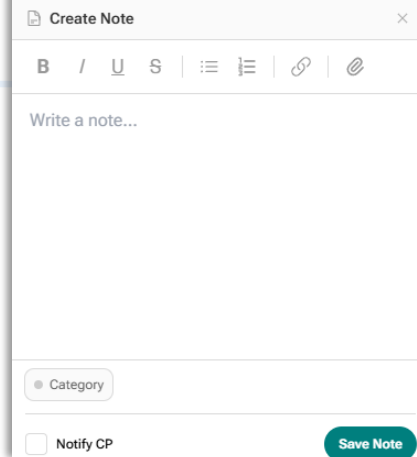
Please direct your queries to your Partnership or Relationship Manager. Clients can query their statements by calling Trilogy Care directly on 1300 690 145 and following the prompts.

Q

How often do we have to leave notes, or do check-ins?

A

At a minimum, please leave one note per client per month in the Trilogy Care Portal. For check-ins (tracking your client's progress against their health goals and any changes in their condition), this remains a bi-monthly requirement: every two months.



The screenshot shows a 'Create Note' modal window. At the top, there's a title bar with a close button. Below it is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), strikethrough (S), bulleted list, numbered list, link, and unlink. The main text area contains the placeholder 'Write a note...'. Below the text area is a 'Category' dropdown menu. At the bottom, there is a checkbox labeled 'Notify CP' and a green 'Save Note' button.

Q

Where can I find the apology the Government made to Trilogy Care about the statement delays?

A

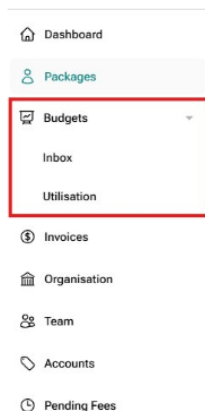
You can find it here: <https://www.thesenior.com.au/story/9231004/government-adds-3-billion-to-aged-care-but-providers-want-more/>

Q What's a quick way for me to tell how much my client has left to spend each quarter?

A In the Portal, navigate to Budgets -> Utilisation to see the status of your clients' overall budgets at a glance.

Use this is a tool to flag, review, and take action as needed

SaH Portal: Budgets Folder



Inbox: In this section you prioritise service planning.

Budgets Inbox

You can prioritise budget planning here

Package stage	Active	Onboarding	Filter	Package	Classification	Package level	Budget status	Risk
Package %	Service Plan Status	In Review For	Care Partner %	Classification %	Care Option	Level %		
MR-123270	No Plan	-	Jordan Wessling	-	Fully Discontinued	SCP 1		U2 Create Plan
TR-171838	No Plan	-	Jordan Wessling	-	Fully Discontinued	SCP 1		U2 Create Plan
IC-441140	No Plan	-	Jordan Wessling	-	Fully Discontinued	SCP 1		U2 Create Plan
BA-020606	No Plan	-	Jordan Wessling	-	Fully Discontinued	SCP 1		U2 Create Plan

Utilisation: Funding stream utilisation: Current package planned, spent, and projected utilisation on funding streams

Utilisation context

My planned utilisation overview



Filter Care partner Care coordinator Classification Package level

Nadia | Partnerships Liaison Manager

Key takeaways

- **Growth:** With an aging population, aged care remains a long-term growing and sustainable sector.
- **Care:** Client check-in cadence, AT-HM, Cab Charge & Meal requests, responsible budget management and making the most of Care Partner meetings
- **Portal:** Improved check-in notifications are coming, recipient emails now live in the Care Circle, download statements, and give us feedback through the help centre!

Next session date

Wednesday, 24th of June 2026

12:00pm – 1:00pm



Resources

- ☐ [Coordinator Resource Hub](#)
- ☐ [Support at Home Program Manual](#)
- ☐ [Portal Support](#)



Thank You

Have a question after the session?

Reach out to your Partnership Manager or Care Partner for support

Next session: June 2026

See you next time!

