MONTHLY COORDINATOR INFORMATION SESSION

Information Session



Wednesday 4 November 2026 · 12pm AEST

Choice · Control · Independence

Trilogy Care

Today's agenda

01	**Welcome & housekeeping** Tiffany Whitelaw	3 mins
02	**Executive update** Nick Lunn	5 mins
03	**Co-contribution invoices** Harry Preston	7 mins
04	**GROW showcase** Jake Kelly-Grubb	10 mins
05	**Care Team update** Scott Roberts	7 mins
06	**The Partner Hub** Lance Scaife-Elliott	5 mins
07	**Compliance** Zoe Judd	5 mins
08	**Conclusion & close** Tiffany Whitelaw	5 mins

01

Welcome & housekeeping

Tiffany Whitelaw

Community Capability & Operations Manager

3 mins

Joining us today

Presenters

Nick Lunn
Chief Growth Officer

Harry Preston
Manager, Collections

Scott Roberts
Head of Care – Fully Coordinated

Jake Kelly-Grubb
Team Leader – Business Development

Lance Scaife-Elliott
Partner Enablement & Continuous Improvement Lead

Zoe Judd
General Manager – Supply Chain Assurance, Compliance & Partnerships

How to participate

- This is a presentation-style webinar. You'll stay on mute, but please use the chat.
- The Trilogy team is on standby to answer questions live.
- We'll answer as many questions as we can, but may not get to all of them.

Resources

Slides will be on the Coordinator Resource Page after today's session.

02

Executive update

Nick Lunn

Chief Growth Officer

5 mins

EXECUTIVE UPDATE

A record month, and what's next

Record month

Thank you and well done to every coordinator and partner.
More new packages are coming, keeping the momentum going.

Partner events

Sydney was a success. Melbourne is next.

Important focus

Utilisation and personal care: helping clients use their packages.

Complaints

Redesigned process in place. Significant improvement over the last three months.

What we're building

- **Uber project:** started, delivering in December
- **AI access:** being developed
- **Client referrals:** new system to refer quickly and easily
- **Supplier referrals:** scoping access to suppliers across the Trilogy network
- **AT-HM:** home modifications process redesign
- **Coordinator training:** being redesigned

New people in BD

Rhys Gibbs
Head of Business Development

Ann Cavanagh
GM of Vic Partnerships

Lance Scaife-Elliott
Partner Enablement Lead

Partnership Support Officer
Coming soon

Trilogy Care

03

Co-contribution invoices

Harry Preston

Manager, Collections

7 mins

CO-CONTRIBUTIONS

What clients pay

Rate set by Services Australia

Based on the client's income and assets. Trilogy Care cannot change it.

Clinical supports

No contribution for any client.

Personal care

Fully government funded from 1 October 2026.

Earlier months

Services are confirmed with Services Australia after delivery, so an invoice can include earlier months.

How Sales and Care Coordinators help

Sales, at onboarding

- Capture a working email, phone and any representative.
- Promote direct debit as the main way to pay.
- Explain the contribution in plain language.
- Remind clients to speak to Services Australia about their rate.
- Follow up until the agreement is signed.

Care Coordinators, ongoing

- Help clients match their invoice to their monthly statement.
- Keep contact details current in the Portal.
- Offer a payment plan, and help with hardship support.
- Raise a billing query if a clinical support is charged.
- **Never promise to change a rate.**

CONTACT DETAILS

An invoice has to arrive to be paid

$112,580

outstanding on 184 debtors whose billing email bounced

633 open invoices, all past due

Source: open invoices list, 4 November 2026

54% of bounced billing emails went to placeholder or invalid addresses

957 of 1,767 bounces across the mailbox, 11 September to 13 October 2026

Sales

Capture a real email at onboarding. If the client has none, record their representative's.

Care Coordinators

Check email and phone each time you speak to a client.

Clients cannot pay an invoice they never receive.

HOW WE WILL CONTACT YOU

Email first, then a phone call

Collections will contact care partners about outstanding co-contribution invoices.

1 We email

We tell you which of your clients have an invoice to follow up.

2 We call

We phone you about overdue or disputed invoices.

3 We record it

Every call ends with a named person and a callback time. Outcomes go in the CRM.

Only Services Australia can change a client's contribution rate. Please do not promise a change.

SUMMARY

How you can help

Trilogy Care

Capture real details

A working email and phone at onboarding.

Promote direct debit

The easiest way for clients to pay on time.

Explain the invoice

Match each line to the monthly statement.

Flag hardship early

Offer a payment plan and hardship support.

04

GROW showcase

Jake Kelly-Grubb

Team Leader – Business Development

10 mins

Home Care Prices website

What it is

- Trilogy Care's price comparison website for Support at Home
- Compares published prices by suburb or postcode, and by service
- More than 100,000 price points gathered each month

Use it for competitor benchmarking

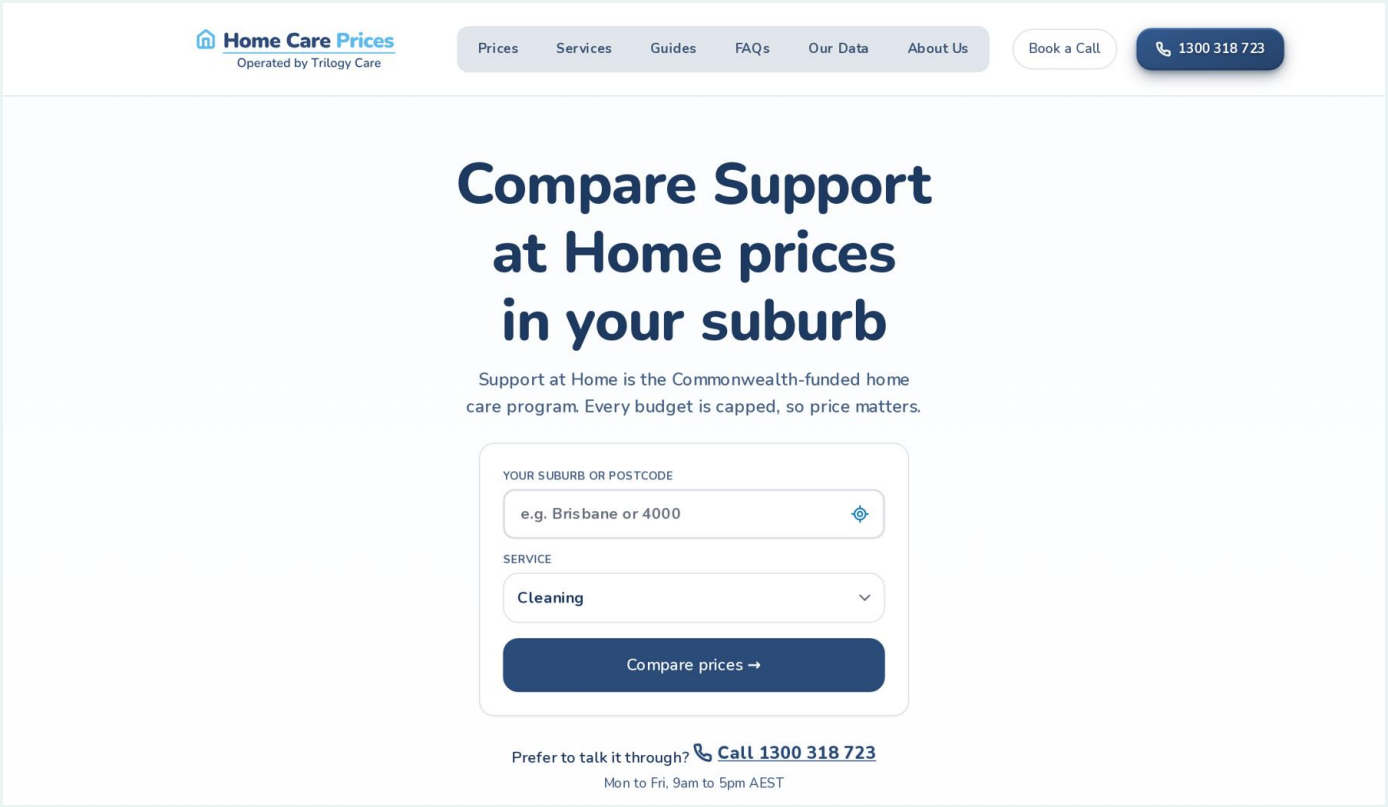
- Compare rates with a panel of major full service providers
- Benchmark by service, including cleaning, personal care, nursing and allied health
- See the hourly difference to help calculate and compare hours of delivery

homecareprices.com.au

We compare published prices only. We do not rank providers or judge quality.

EXAMPLE · HOME CARE PRICES HOME PAGE

Search prices in your suburb



homecareprices.com.au, screenshot taken 1 November 2026

1 Enter a location

Type a suburb or postcode, or use your location.

2 Choose a service

For example cleaning, personal care, nursing or physiotherapy.

3 Compare prices

See local rates side by side.

EXAMPLE · SYDNEY 2000, PERSONAL CARE

Sydney: personal care

PROVIDER	CARE TYPE	DIFFERENCE	HOURLY RATE
Trilogy Care · Self Managed	Self Managed	BASELINE	**$88** /hr
RSL LifeCare	Full Service	+$51/hr (+58%)	**$139** /hr
Anglicare Sydney (Anglicare At Home)	Full Service	+$47.15/hr (+54%)	**$135.15** /hr
Silverchain	Full Service	+$46/hr (+52%)	**$134** /hr
Australian Unity	Full Service	+$42.20/hr (+48%)	**$130.20** /hr
HammondCare At Home	Full Service	+$42/hr (+48%)	**$130** /hr
HenderCare	Full Service	+$39.50/hr (+45%)	**$127.50** /hr
Bolton Clarke	Full Service	+$38/hr (+43%)	**$126** /hr

Sydney 2000, screenshot taken 1 November 2026. Site prices last updated 29 October 2026.

Full service providers

$109 to $139/hr

Commonwealth benchmark

$115/hr

range $107 to $120

Competitor analysis

Compare supplier costs and coordinator and Trilogy fees against other providers' published prices. You can share the comparison with prospective clients doing their own research.

EXAMPLE · BRISBANE 4000, CLEANING

Brisbane: cleaning

PROVIDER	CARE TYPE	DIFFERENCE	HOURLY RATE
Trilogy Care · Self Managed	Self Managed	BASELINE	**$71** /hr
BlueCare	Full Service	+$64/hr (+90%)	**$135** /hr
Suncare Community Services	Full Service	+$59/hr (+83%)	**$130** /hr
Alzheimer's Association of Queensland	Full Service	+$54/hr (+76%)	**$125** /hr
Dementia Caring Australia	Full Service	+$51/hr (+72%)	**$122** /hr
Silverchain	Full Service	+$50.50/hr (+71%)	**$121.50** /hr
Cura	Full Service	+$49/hr (+69%)	**$120** /hr
Anglicare Southern Queensland	Full Service	+$47/hr (+66%)	**$118** /hr

Brisbane 4000, screenshot taken 1 November 2026. Site prices last updated 29 October 2026.

Full service providers

$118 to $135/hr

Commonwealth benchmark

$110/hr

range $100 to $117

Competitor analysis

Compare supplier costs and coordinator and Trilogy fees against other providers' published prices. You can share the comparison with prospective clients doing their own research.

Client onboarding: three things to cover

1 Enduring Power of Attorney

If an Enduring Power of Attorney has been enacted, obtain the documents before the Care Plan meeting.

2 Medical Health Summary

Send the client's Medical Health Summary before the Care Plan meeting.

3 Client Agreement

Discuss and sight the Client Agreement with the client, and decide how it will be signed.



Verbal

Make sure the agreement has been shown to the client and they have agreed to it.



ZohoSign

Select ZohoSign with the client's or representative's email. Remind them it is sent right after the Care Plan meeting.



Physical signing

The client signs in person once the Care Plan meeting is complete.

05

Care Team update

Melbourne office, client engagement and your monthly workbook

Scott Roberts

Head of Care – Fully Coordinated

7 mins

MELBOURNE OFFICE UPDATE

Our Melbourne team is here

A full pod of care partners is now based in South Yarra, Melbourne.

Where possible, they are allocated to Melbourne coordinators first.

Instant capacity to service partners. Some movement between care partners is expected, and it is good for long-term sustainability.

Local care partners working alongside local coordinators.



CLIENT ENGAGEMENT

Supporting clients to use their package

We are identifying clients who are not using their package, or have had no service on our record for some time.

1 We identify

We check in with coordinators and partners to surface these clients.

2 You follow up

Check in with the client, or tell us the circumstances if we don't know them.

3 You inform us

Tell us what needs to happen and how we can help.

There are often good reasons a client isn't using services. This is about knowing what is happening with each client.
Emails have already gone to some coordinators. Others will follow soon.

CLIENT FINANCES

Your monthly workbook

Every month, each coordinator gets one email and one workbook from their Care Partner.

What it is

- Covers all your shared clients
- Replaces the monthly pacing SMS
- Shows budget, spent, available, carry-over and any unspent Home Care Package funds

How it's calculated

- Portal figures from the day the email is sent
- Spent counts fully paid bills only
- Available is the quarterly budget minus spent
- Carry-over is the most that can move to next quarter: 10% of budget or $1,000, whichever is greater
- Unspent Home Care Package funds do not expire at quarter end

Rollover

Day 61 or 62

Once a client's rollover is in the Portal, it appears in the workbook sent in the third month of the quarter.

Getting clients ready for onboarding

A short chat beforehand helps clients know what to expect:

1 Support at Home

What the program is and how we work together.

2 The meeting

Its purpose and what happens on the day.

3 Fees and funding

Their fees, funding and subsidy.

4 Available services

What their package can provide.

OUR ASSESSMENT TEAM

+5 **more assessment partners: meetings within two days**

- A designated team for coordinators, who know coordinator fees.
- They build relationships and support your team through onboarding.

Our aim is for clients to understand what they can use in their package, and to get the best outcomes together.

SUMMARY

How you can help

Trilogy Care

Connect locally

Get to know your Melbourne care partner.

Use your workbook

Check each client's budget, spend and carry-over.

Check in and update

Check in with clients who have no invoices or services, and keep your care partner updated.

Prepare clients early

Set expectations on the program, meeting, fees and services.

06

The Partner Hub

Lance Scaife-Elliott

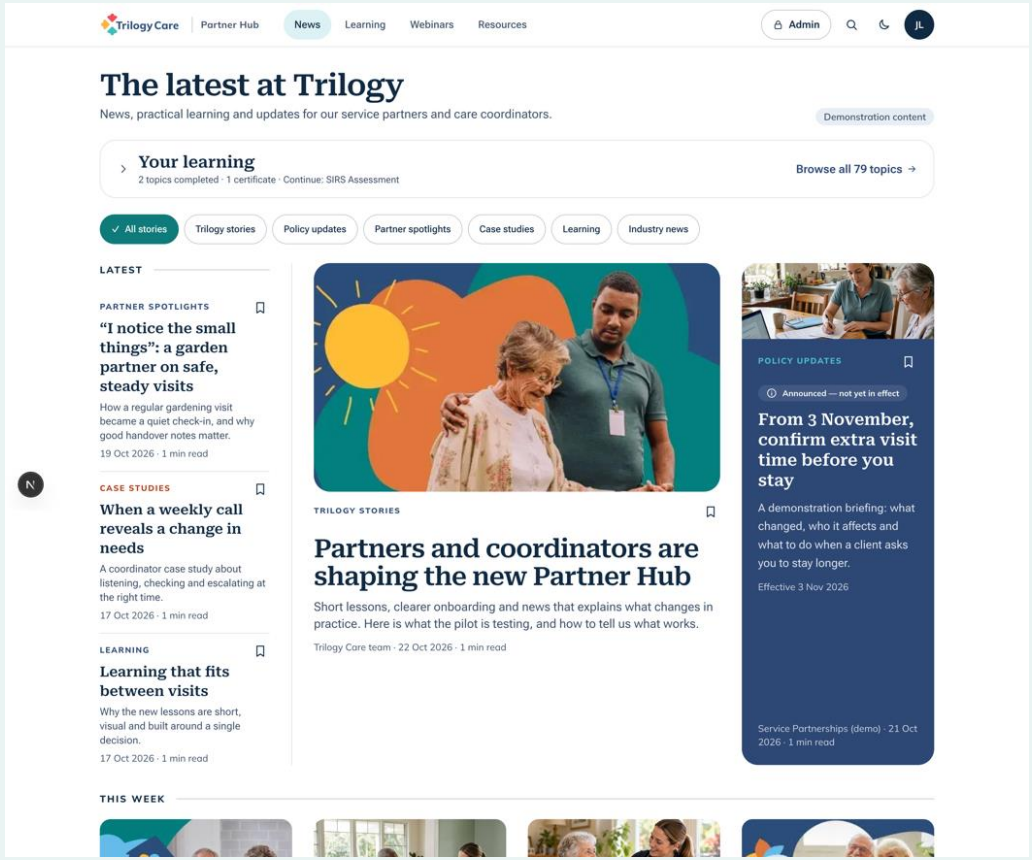
Partner Enablement & Continuous Improvement Lead

5 mins

Introducing the Trilogy Care Partner Hub

A better way to connect, learn and grow together

A central place where our partners and coordinators can access practical learning, stay informed and feel supported in delivering quality care.



Great care starts with confident, informed people

We want to make it easier to:

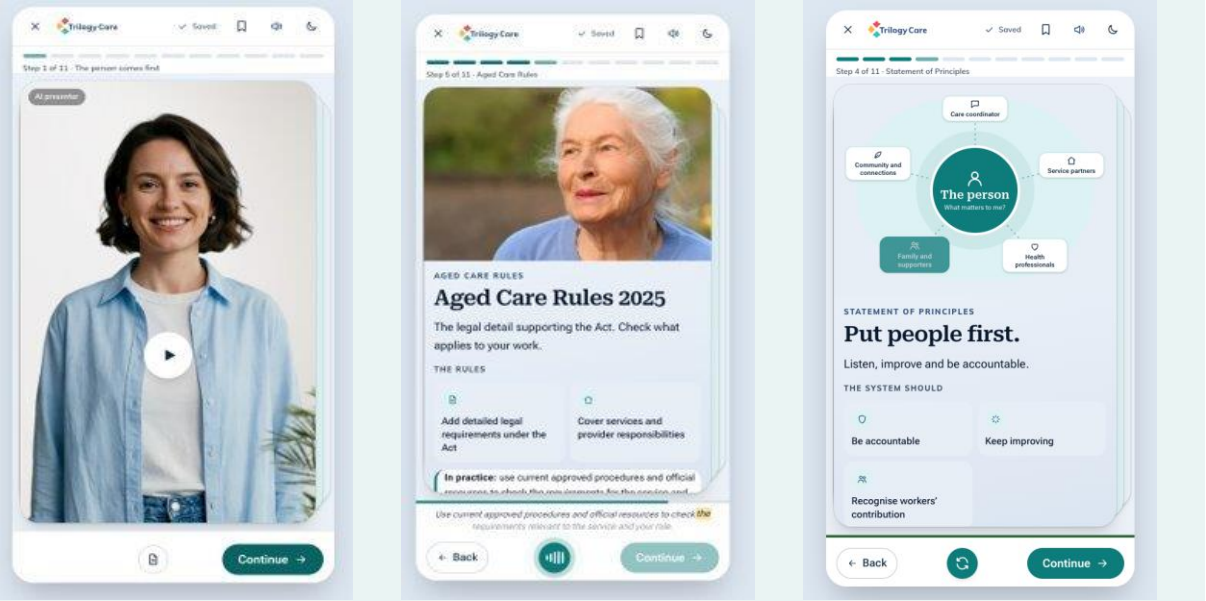
- Find the right information when needed.
- Understand responsibilities and expectations.
- Keep up with changes.
- Build confidence through ongoing learning.



Learning designed around your day

Small lesson topics. Practical knowledge.

- Accessible on mobile, tablet or desktop
- Interactive questions and real care scenarios
- Pause and return when convenient

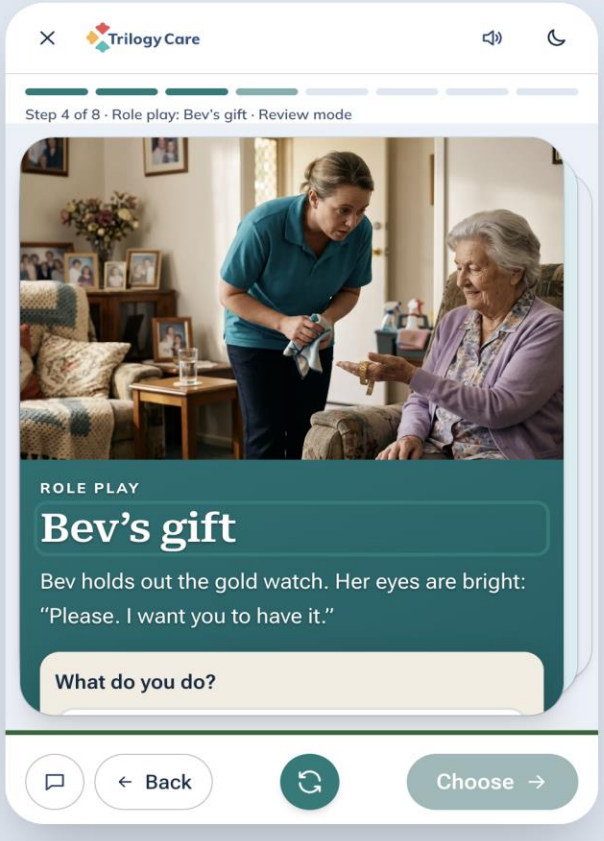


Not just knowing the rules. Knowing what to do.

The Hub uses realistic situations that partners and coordinators might encounter.

> *Bev offers her cleaner a valuable gold watch as a gift. She insists they take it, saying it would mean a lot to her. The cleaner knows accepting valuable gifts isn't appropriate. What should they do?*

Participants make a decision, explore the consequences and receive practical feedback.



More than a learning platform

Our longer-term vision is a connected partner experience.

One place for:

- Learning pathways
- News
- Important updates
- Events and resources



Help us shape what comes next

We'd love your thoughts on:

1. What information or training would help you most in your role?
2. What gets in the way of training today?
3. What would make the Hub genuinely useful in your day-to-day work?



If you'd like to take part in the pilot, let us know. Your feedback will directly influence how the platform develops.

07

Compliance

Zoe Judd

General Manager – Supply Chain Assurance, Compliance & Partnerships

5 mins

Home modifications under Support at Home

How we engage, verify and manage contractors for home modifications from a supply chain compliance lens, and where we are focusing to clear the verification backlog.

1

Supplier quotes

Obtain quotes from verified suppliers.

2

Contractor verification

Engage the contractor and verify their documents.

3

Works & sign-off

Complete installation and formal sign-off.

CONTRACTOR VERIFICATION

What we check

Business identity

- Active ABN
- GST registration
- Bank details

Licensing

- State or territory licences matching scope and thresholds

Insurance

- Public liability
- WorkCover
- Home Warranty and other state or territory insurances, where required

Worker screening

- Police checks or NDIS worker screening clearance

Agreement

- Code of Conduct
- Building contract where the state or territory threshold requires one

Verification is ongoing. Expiries are tracked and re-checked before each engagement.

Compliance responsibilities and jurisdictional notes

Our responsibility

We remain accountable for quality and safety under the Aged Care Act. No verified status, no work order.

State specifics

Example: Queensland requires QBCC and trade licences for certain work. Confirm insurance minimums per policy.

Work-specific documents

Home Warranty Insurance and building contracts must be provided for each relevant engagement, even for the same client.

Resources that support the process

People

Supply chain compliance team, occupational therapists, care partners and the contractor panel.

Tools and references

Support at Home Program Manual (AT-HM), AT-HM claiming framework, supplier document calculator tool.

PERFORMANCE

Current verification performance

Median time to verify today

14 days

Target

7 days



Why the backlog built up

Higher supplier volume after the transition, manual document collection, and repeated follow-ups for missing or expired licences and insurance.

ACTIONS UNDERWAY

Clearing the backlog

Short term

10 casual staff processing pending verifications, chasing documents, and prioritising by participant risk and funding deadlines.

Long term

Systems investment: trial automatic document processing and streamlined triage to reduce manual handling for low-risk suppliers.

Goal: clear the backlog, then verify new suppliers within 7 business days. Systems plus the casual team achieve and sustain this.

SUMMARY

How you can help

Book verified only

Check the supplier register before engaging. If the supplier is already registered with Trilogy Care, the process is faster.

Send complete packs

Include the prescription, quote and scope together, so follow-ups don't delay works.

Flag urgency

Tell us about safety risks or other urgent matters so we can prioritise.

Next steps and contact

Trilogy Care

1 Short term

The casual verification team is clearing the backlog this month.

2 Medium term

Roll out automated checks.

3 Always

Prioritise safety and funding deadlines. Verification standards stay unchanged.

Goal

Verify new suppliers within 7 business days

Questions?

Contact the Compliance Team

08

Conclusion & close

Tiffany Whitelaw

Community Capability & Operations Manager

5 mins

SEE YOU NEXT MONTH

Thank you



Have a question after the session? Reach out to your Partnership Manager or Care Partner.

Next session

27 November 2026 · 12pm AEST

Resources: trilogycare.com.au

Trilogy Care

Q

What happens if they put in a hardship form?

A

If a client lodges a financial hardship application with Services Australia, Trilogy Care stops invoicing and collecting their participant contributions from the date they tell us they intend to lodge (or have lodged), and their services continue unchanged while it is assessed. Please send your Care Partner the lodgement date and the Services Australia reference number so Finance can pause billing straight away. If the application is approved, the Government pays a fee reduction supplement that covers some or all of the contribution, backdated to the application date (Services Australia can backdate further with evidence, but not before 1 November 2025). If it is declined, the contributions that were suspended from the application date become payable; the Care Partner or our Collections Team will talk the client through options, including a payment plan, and services are never stopped for non-payment without at least 14 days' written notice.

Q

If a client has requested paper statements because they don't have email, do co contribution invoices get posted?

A

Yes. Where a client has no email, the monthly statement and any participant-contribution invoice can be posted instead. Ask the Care Partner to record the client's preferred delivery method on their record so both go by post.

Q

Does Trilogy apply hardship application to services Australia on behalf of the client or the client has to reach out to Services Australia?

A

The application has to come from the client, or from someone authorised to act for them (for example an enduring power of attorney or a Services Australia nominee); Trilogy Care cannot lodge it in its own right. We can help with the practical side: getting the SA462 form, explaining what is needed, printing and posting. If more help is needed, the Care Partner can refer the client to a financial counsellor or the Aged Care Advocacy Line on 1800 700 600. Start here: https://www.servicesaustralia.gov.au/steps-to-claim-financial-hardship-assistance-with-aged-care-costs Once it is lodged, let the Care Partner know the date and reference number so contributions are paused.

Q

What is being done to make TPC's etc easier for all? Surely this should be in the portal OR make the budget in the portal to be able to be signed off by the client to confirm?

A

We know the current process is heavy for coordinators, and we are reviewing it with the aim of simplifying it. We will share details as soon as they are confirmed. Budget sign-off in the portal and has been raised with our product team as a requested enhancement, and we will update you when there is a confirmed date.

Q

Are the client invoices and also supplier invoices format being changed so that clients can actually see the supplier cost, fees, gst etc? One price with no breakdown is very confusing for them and doesn't line up to the budgets

A

Your client's monthly statement is the document that has to show, for each service, the service name, the date, the units or hours, the price charged, the client's contribution, the Government subsidy and whether a third party delivered it. The price shown is the full price for that service. The Program Manual requires every cost of delivering a service, including any overhead on third-party workers, to be built into a single unit price rather than itemised separately, which is why it differs from the supplier's own invoice. Support at Home services are GST-free to the client, so GST is not charged to their budget. Participant-contribution invoices are itemised and reconcile to the statement. If a client wants to see how a particular price was built up, their Care Partner can walk them through it. We are also looking at how the breakdown is presented in the portal.

Q

My client currently has funds in her HC account and no ATHM. She had an AT expense that ws added to her budget rejected. My understanding is that even if she has AT-HM funding available, any costs would be drawn from her HC account first, and AT-HM funding would only be used once those funds are exhausted. Given that, could you please explain why this was rejected? Regardless of whether she had AT-HM funding, it appears the cost would have come from her HC account either way?

A

Two different pots are involved, so the first thing to check is which one the item was put against. (1) Ongoing Support at Home quarterly budget: AT-HM list items cannot be bought from this budget at all, even if funds remain. (2) Unspent Home Care Package (HCP) funds: for clients who transitioned from a HCP, the Commonwealth portion of their unspent HCP funds must be used for AT-HM items before any AT-HM tier funding, and can be used even where the client only holds the transitional AT-HM tier. If the client has since been reassessed, though, AT-HM has to be approved in the new support plan first.

In every case the item has to be on the AT-HM list, address an assessed need, and have a prescription where the list requires one (all home modifications, and AT items marked "prescribed"). The specific reason for your client's rejection is on the rejection note; your Care Partner can tell you which of these applied.

Q

When are you check in emails going to come back. These are really helpful to sole care partners as a reminder to check in with clients. Thanks

A

Thanks, we know the reminder emails were useful. They came from an older notification set-up that was switched off when check-ins moved into the portal. A replacement reminder has been built but is not switched on yet, and we do not have a confirmed date. In the meantime, please keep doing your own regular check-ins and record each one as a note on the client's portal record; your Care Partner also checks in with the client on their own schedule. It also helps if you confirm your clients' phone and email details on the portal are current, so check-ins reach them.

Q

Are there expiry time frames on approved HM as I am seeing a delay in getting the job done due to supplier timelines. Because the process take a long time to approval, they schedule other jobs naturally.

A

Yes. AT-HM funding is time-limited: it must be spent, not just committed, within 12 months of the start of the funding period, and Trilogy Care then has 60 days to finalise claims. After that the AT or HM account closes and any unspent balance is gone; it does not roll over.

The only extensions are for high-tier ($15,000) home modifications, where Trilogy Care can apply for a further 12 months if evidence of progress (quotes, council approval, building contract) is lodged within the first 12 months, and for assistive technology where a listed progressive condition has been certified. There is no extension for low or medium tiers. So please check the end date on your client's AT-HM approval and book suppliers so the work is finished, invoiced and paid inside that window. If a complex high-tier modification looks like running over, tell the Care Partner early so the extension can be lodged in time.

Q

Who should I contact to go Home mods onboarding?

A

New clients with HM funding: onboard through the usual coordinator onboarding form. Existing Trilogy Care clients who have had AT-HM funding added after a support plan review: contact their Care Partner, who lodges the AT-HM notification with Services Australia so the funding can be accessed.