Purpose In Practice



Monthly Coordinator Information Session

Wednesday, 30 September 2026 · 12pm

Trilogy Care

Today's Agenda

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01 **Welcome & Housekeeping** — 3 mins
Tiffany Whitelaw

02 **Business Showcase** — 15mins
Jay Pery & Baden Crathern

03 **Care Team Update** — 10 mins
Daniel O'Shea

04 **Finance** — 10mins
Steven Boge

05 **Conclusion & Close** — 3 mins
Tiffany Whitelaw

Trilogy Care

01

Welcome & Housekeeping

Tiffany Whitelaw

Community Capability And Operations Manager

⏱️ 3 mins

Welcome & Housekeeping

Tiffany Whitelaw – Community Capability & Operations Manager

Joining us today are...

- Daniel | Operations Manager - External Coordination & Assessment
- Steven | Senior Business Analyst
- Jay & Baden | Business Development

How to participate

- Webinar is presentation style – you'll remain on mute but are welcome to use the chat to share your thoughts
- 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

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02

Business Showcase

Jay Pery & Baden Crathern

Business Development Team Leaders

⏱️ 15 mins

Business Development

Jay Pery & Baden Crathern | Business Development Team Leaders

TPC's – why?

- Aged Care Quality and Safety Commission Requirement
- TPC's should be put in place to protect CLIENTS and SUPPLIERS from future invoice disputes
- This is a Trilogy requirement for auditing, compliance, reporting and invoice payment

What's Needed

- Required for any business providing services
- All evidence must clearly demonstrate:
  - The service being delivered
  - The supplier delivering the service
  - The agreed pricing or fee structure
  - The Care Recipient's acceptance of the arrangement
- The TPC should be signed by the Supplier, and EITHER the Client OR Coordinator OR Authorised Representative
  - **NOTE** – coordinators who are also providing the service cannot sign on behalf of the Client

Business Development

Jay Pery & Baden Crathern | Business Development Team Leaders

How to submit

- Acceptable methods of TPC submission for suppliers or coordinators:
  - Directly via email to your Partnership Manager or Relationship Manager **(preferred)**
  - Suppliers can upload TPC's directly within their own portal supplier profile
  - Through the submission link sent to suppliers via email

The Partnerships and Business Development team have committed additional resourcing to support you in ensuring your suppliers are verified for invoice payment. If you're unsure, please reach out to us!

Rejected TPC or no TPC

- A TPC Agreement or equivalent document may be rejected where:
  - Services are not clearly identified
  - Rates or charges are missing
  - The Care Recipient's consent cannot be demonstrated
  - The document is incomplete
  - The document does not provide sufficient evidence of the agreed service arrangement

- All outstanding TPC Agreements, or acceptable alternative evidence, must be provided by 31/10/2026.
- If the required documentation has not been received by this time, future invoices may be rejected and may no longer be eligible for payment.

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03

Care Team Update

Daniel O'Shea

Operations Manager – External Coordination

⏱️ 10 mins

Care Team Update

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Daniel O'Shea | Care

Care update — Care Partners – Team Updates and Enhancements

New Faces and Recruitment
- How we onboard our team
- Scaling up

Structure
- PODS and People
- Roles and Objectives

Investing in our people to focus on our service offering
- Our people are our greatest asset
- Training and development
- Match Making our Care Partners to our Coordinators

Benefits to our structure and how we work
- More engagement
- Better coverage
- No Gaps

Care update — External Care and Coordinators – How we fit together

What is the end game?

- To ensure our clients get the support and care they need, working closely with our Coordinator network.
- Our clients feel connected always.

What we can do for our Coordinators and what you can do for us

- Reach out to CP's for anything that you are unsure of, need clarity on, or if you would like more information.
- Use the Service List and the ATHM List as your secret weapon to unlock great opportunities
- Sharing the information to ensure we are all on the same page

Care Team Update

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Daniel O'Shea | Care

Care update — Check Ins - Benefits and Insights

Why we do Check Ins

- Keeping up to date
- Understanding Service needs
- Budgets
- Feedback
- Opportunity to talk about how we all work together.
- Extra Care

Care update — Pain Points and Opportunities

Budgets

- Setting the budget to reflect services
- Avoid consistent budget requests to reduce admin work
- True reflection of services
- Ensure care needs are identified and actioned accordingly within budget constraints

Inclusions

- Partners and team leaders now have better visibility of inclusions through a new internal tool, which will be able to provide additional information to coordinators. The idea is that this streamlines the process, preventing any unwanted issues. So it means that compliance gets involved earlier to ensure that there are no delays with supplier compliance.

Assessment Team Update

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Daniel O'Shea | Care

Assessment Tips & Tricks



What is Happening in Assessment

Structure and People
- Three Teams (POD 1 , POD 2 and our Booking Coordinators)
- What is the Assessment Partner DNA (Compassionate, Rapport builders, Industry knowledge)
- Team of 34

New Tools and Process Reviews and enhancements
- More information – Better conversations, understanding outcomes.
- Better Service and client journey

Meetings with Coordinators
- Discuss the budget/services prior to the call
- Help the client read the agreement so they are ready to give verbal on the meeting
- Please contact Trilogy Care if you need to cancel a meeting, don't just book another meeting. Impacts are double bookings which blocks other available slots.

Pain Points
- Prep is everything. Documentation ready is key.
- Getting everyone to the meeting on time
- Is an Interpreter required?

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04

Finance

Steven Boge

Finance

⏱️ 10 mins

Finance

Steven Boge | Finance

Help Centre

- Live chat with our Brisbane-based team, for any question about invoices, payments or the portal
- Find it in the bottom left corner of the portal
- Monday to Friday, 8:30am to 5:00pm AEST
- After hours? Send a message and we'll respond when we're back online
- Tickets are created and assigned

"Every message goes to the right team and is tracked until it's resolved. It doesn't get lost in an inbox."



6 months of queries - What we've been hearing

Since March, we've received more than 500 questions from coordinators.

Some of the most common:

- Checking whether an invoice has been paid
- Why an invoice was rejected and how to resubmit
- How and where to submit invoices
- Supplier approval
- Portal access and adding team members

Support at Home billing essentials

https://trilogycare.com.au/supplier-resources

Finance

Steven Boge | Finance

6 months of answers

Checking whether an invoice has been paid

- Check the invoice status in the portal first (choose “Invoices” on the left, find your invoice then “View”
- Invoice stages are generally.... **Submitted** → Awaiting Approval → On-Hold → In Review → **Approved** → **Paid** ☺
- "Awaiting approval" means it's with the client's Care Partner
- Still unsure? Message us with the invoice number and client name

Why an invoice was rejected and how to resubmit

- The rejection reason is shown on the invoice in the portal
- Fix that issue and resubmit through the portal
- List each service on its own line (we are seeing more SERV codes)

How and where to submit invoices

- Submit through the portal, once
- Emailing the same invoice as well creates a duplicate and slows payment

Admin reminders

- “Real” client emails are essential for communication and sending Co-Contribution Invoices
- Speaking of co-contribution invoices .... The team prefer that clients set up easy direct debits. → https://trilo.creditapplication.io/trilogycare

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05

Conclusion & Close

Tiffany Whitelaw

Community Capability & Operations Manager

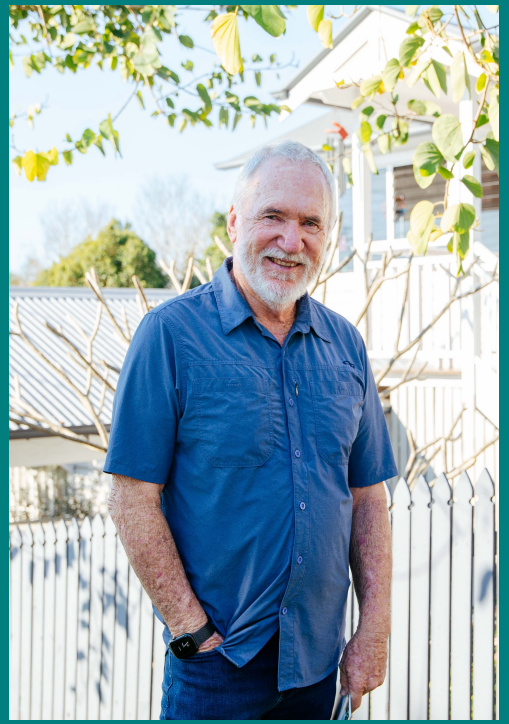
⏱️ 3 mins

Thank You

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

Next session: October 28th 2026
Time: 12pm QLD AEST

Resources: trilogycare.com.au



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Choice · Control · Independence