Pride
Aged Living

With the introduction of the new Aged Care Act, the sector is undergoing a significant shift toward greater transparency, consumer choice, and value. Implementation of the Higher Everyday Living Fee (HELF) model is a key component of ongoing capacity to deliver on resident preferences and increased service quality and range.

HELF Transition Executive Summary Checklist

This checklist is designed to support executives and senior management teams as they transition to HELF-compliant service delivery. It outlines key actions across legal, operational, financial, marketing, and workforce domains to ensure organisational readiness.

Domain	Key Actions	Lead Department	Phase	Notes / Dependencies
Contracts & Agreements	Develop HELF-compliant Resident Agreements and Purchase Order forms Ensure legal alignment across documents and annexures	Legal / Governance	Planning	Requires legal opinion before finalisation
Product Development	Analyse market affordability and competitor pricing Define packaged, ongoing, and ad hoc services with internal pricing tools	Strategy / Ops / Finance	Development	Depends on market data and home-level service offerings and availability
Sales & Marketing	Update all collateral (brochures, KFS, My Aged Care) Develop inquiry-to-admission processes and promotional materials	Marketing / Admissions	Development	Close coordination needed with design, compliance, and web teams for documents and facility management KPIs set prior to go-live
Finance	Establish billing systems for HELF packages Define GST treatment and social/hospital leave crediting processes	Finance	Implementation	System readiness and training critical before go-live
Quality & Compliance	Develop HELF policy and integrate into operational procedures	Quality / Clinical Governance	Development	Should align with regulatory standards and internal audit schedules
Operations	Design delivery processes for HELF services based on resident choice Ensure procurement and IT readiness	Operations / IT / Procurement	Implementation	Requires detailed staff workflows and documentation (HELF Manual)
Learning & Development	Develop and deliver tailored training (frontline, dept heads, corporate) Include HELF in onboarding materials	L&D / HR / Ops	Pre-Launch	Training must be completed across all sites before rollout

By using this tool, leadership teams can drive a coordinated and compliant approach, align services with consumer expectations, and maintain high standards of care, customer experience, and regulatory compliance throughout the reform process.

CONTRACTS & RESIDENT AGREEMENTS

Create a HELF agreement based on the new requirements

- Obtain legal opinion as to the creation of an HELF agreement and Purchase Order Forms for ongoing and for ad hoc purchases

- Review the HELF agreement documents against the new Resident Agreement to ensure alignment of relevant linked terms and definitions

- Ensure agreement annexures are considered for all purchase options; packaged, individual ongoing services and ad hoc purchases.

HELF PRODUCT DEVELOPMENT

Conduct research to evaluate market affordability, competitor offerings and determine product pricing

- Analyse the market affordability from both income and asset perspectives

- Research competitors for age and quality of the home, range of services, RADs and other fees

- Consider the partially and fully supported resident ratios for the homes against demographic region averages

- Determine an appropriate pricing range for packaged daily fees and individual service fees

Design a new HELF program

- For each home, create a Packaged Services offering

- Identify selected services that could be offered individually on an ongoing basis such as television

- Identify on demand individual services such as hairdressing or events

- Confirm availability, quality and process of services required to be available to residents under the Services List at all homes

- Create internal use only reference documents that provide descriptions and daily cost/values including service limits where appropriate

SALES & MARKETING

Review existing Marketing material

- Ensure digital and print marketing material is reviewed and updated to reflect compliance with HELF services being

- Create new printed brochures, ideally single sheet or fold out brochure

- Update all Key Features Statements to reflect the HELF programs

- Update My Aged Care website information

- Implement website changes to incorporate HELF goods and services information and their associated costs for all homes

- Establish processes for enquiry to admission communication for optimal customer experience

Confirm sales and communication processes Service program in readiness for HELF transition

- Confirm processes and delegation for offering HELF purchases on admission

- Determine package and individual service uptake KPIs

- Assign accountability of uptake KPIs and monitoring methods

- Ensure a process and associated documents are created and implemented for facilitating the annual review of capacity to derive a benefit from the services and continued agreement to purchase the services

Design new marketing material and promotional strategy

- Create new printed brochures, ideally single sheet or fold out brochure
- Update all of the following as applicable:
  - Facility Brochures
  - Resident handbooks
  - Brochures – fees & charges of aged care

FINANCE

Billing and finance adjustments for readiness to charge HELF

- Establish GST values and billing system and process requirements to ensure GST is billed and paid
- Establish billing system requirements for all HELF program package/s and services
- Establish and document a process for identifying and crediting social and hospital leave

QUALITY

Policy and associated procedures Redesign a new Additional Service program in readiness for HELF transition

- Create and distribute a new HELF Policy
- Ensure all processes supporting operational compliance are embedded into existing or new procedures

OPERATIONS

Create processes to operationalise HELF services under the model of resident choice

- Operational processes for delivering services only to residents who select the service
- Relevant procurement and IT processes and capabilities are reviewed and confirmed
- Efficient process for single use ad hoc service agreement and for change of mind uptake
- Create a HELF Manual or Handbook

LEARNING & DEVELOPMENT

Staff training in HELF

- Develop training material for:
  - Frontline staff, including an onboarding e-Learning module
  - Facility Department Heads
  - HELF Sales & Promotion
- Facilitate PreLaunch training in the HELF rules, compliances and processes for:
  - Frontline staff
  - Facility department heads
  - Corporate services stakeholders
  - All staff involved in enquiry, sales and tour conversations, both remote and on site staff as required
- Operational processes for delivering services to residents purchase the service, and not to those who don't
- Add HELF training to the onboarding Training Matrix