



## Managing Quotes and Budgets for HCP Home Care Package Clients in CareVision

YOUTUBE LINK

### How do you [build and manage quotes and budgets for Home Care Package Clients](#) with CareVision?

To ensure that HCP clients can optimise their funding and allow them to assist their goals within the CareVision platform, the proper management of a client's budget is essential. CareVision's Quote and Budget is a tool that allows you easily accomplish the following:

1. Set up quotes for leads and existing clients
2. Use quotes to generate agreements
3. After the client has accepted the care service plan- establish funding and fees for billing and claims.

CareVision's "Client Quote" organises building and managing quotes and budgets for an HCP client on a single screen, including their fees, funding streams, and bills (both recurring and one-off service charges).

### When is [adding and managing quotes](#) needed in CareVision?

1. When adding new clients
2. For updating current client packages once they are up for renewal or review.
3. Whenever a client's package needs to be updated arising from a substantial change such as upgrading another level of service on their package.



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High Profile Care Circle: VIP

Accommodation Setting: Private Residence - Client o...

- ☒ DETAILED PROFILE
- ☒ QUOTES AND CONTRACTS
- ☒ ACTIVE QUOTES
- ☒ ARCHIVED QUOTES
- ☒ CLIENT GROUPS
- ☒ CARE PLANS
- ☒ SERVICE ORDERS

Adding quotes can be done within the client profile, but you can also add quotes from the “quick create icon” or the quote action board (as shown in the above and below images).

**CAREVISION** Quotes and Contracts

Best Care Provider ... Looking for someone?

PEOPLE ACTIONS CLIENT LEAVE TASKS STAFF LEAVE JOB OFFER NOTIFICATIONS SERVICE REQUESTS FORMS SUBMISSIONS QUOTES AND CONTRACTS SERVICE REVIEW COMMUNICATIONS SCHEDULES COMMUNITY

Quote Type: Active Only Status: Created By:

Reference ID	Created by	Client	Status	Active at	Expires at	Action
QU107-	Andy Alpe	Amanda Griffin	Accepted	18-01-2022	18-02-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU108-	Andy Alpe	Amanda Griffin	Expired	18-01-2022	18-02-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU119-	Bill Roberts	Alison Smith	Expired	26-01-2022	26-02-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU135-	Rachelle Rubiales	Hugh Jack	Expired	09-02-2022	09-03-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU148-	Maggie Simpson	Annie Dawson	Expired	21-02-2022	21-03-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU178-	Maggie Simpson	Britney Gordon	Open	23-03-2022	23-04-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU179-	Jhun Bryan Belen	Steve Baxter	Accepted	23-03-2022	30-06-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU181-	Jhun Bryan Belen	Steve Baxter	Accepted	23-03-2022	30-06-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU187-	Irene Ryan (Real)	Ellen Samuel	Accepted	05-04-2022	05-05-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU189-	Irene Ryan (Real)	Ellen Samuel	Accepted	05-04-2022	05-05-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU190-	Irene Ryan (Real)	Amelia Sanchez	Accepted	06-04-2022	06-05-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU191-	Irene Ryan (Real)	Melanie Scaudire	Accepted	06-04-2022	06-05-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU192-	Jhun Bryan Belen	Newton Scamander	Draft	07-04-2022	07-05-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU193-	Jhun Bryan Belen	Steve Baxter	Draft	07-04-2022	07-05-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU194-	Jhun Bryan Belen	Steve Baxter	Accepted	23-03-2022	30-06-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU196-	Patricia Ann Trinidad	Harry Potter	Open	08-04-2022	08-05-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU197-	Irene Ryan (Real)	Laurie Pine	Accepted	12-04-2022	12-05-2022	[Edit] [Download] [Check] [Print] [Share] [More]
QU197-	Irene Ryan (Real)	Tamir Aronov	Accepted	10-06-2021	10-10-2021	[Edit] [Download] [Check] [Print] [Share] [More]

+ CREATE QUOTES AND CONTRACT



The Quote Creation stage goes through a simple workflow each consisting of notifications that can generate or send updates to interested parties.

For more information on the Quote stages and Statuses, visit [www.carevision.academy](http://www.carevision.academy), and you can find out more about Quotes and Contracts by visiting CareVision's [Knowledge Base](#).