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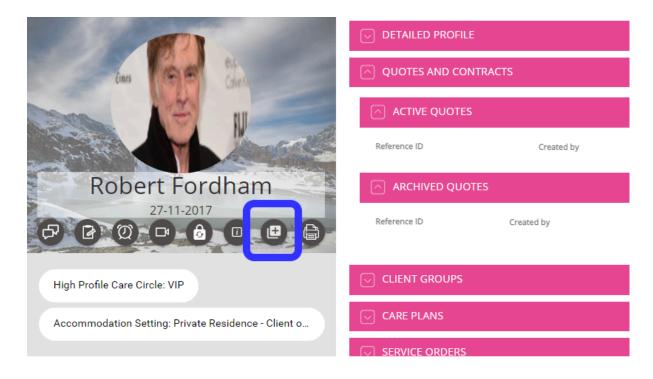
When is [adding and managing quotes](#) needed in CareVision?

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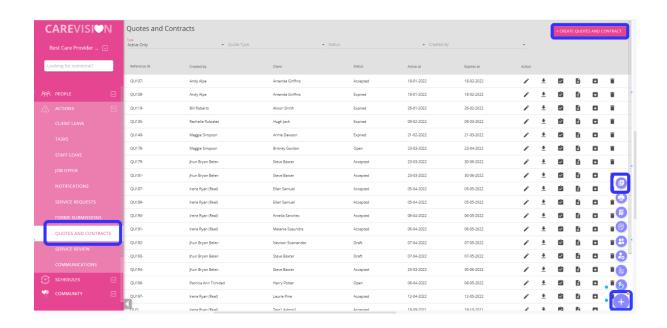
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Adding quotes can be done within the client profile, but you can also add quotes from the "quick create icon" or the quote action board *(as shown in the above and below images).*

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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, and you can find out more about Quotes and Contracts by visiting CareVision's Knowledge Base.