

# HCP Quotes & Budgets

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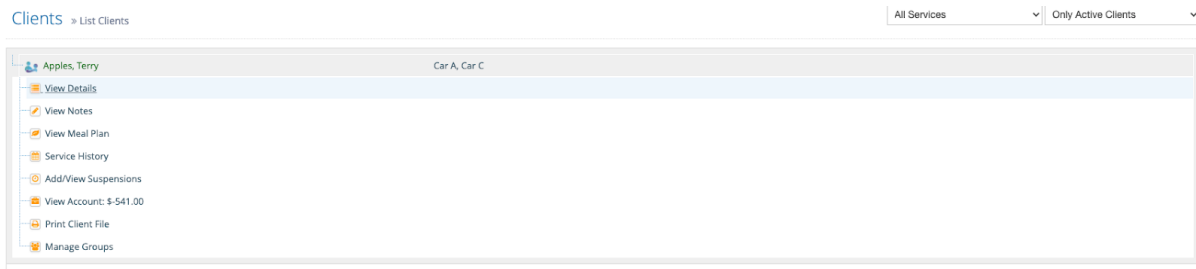
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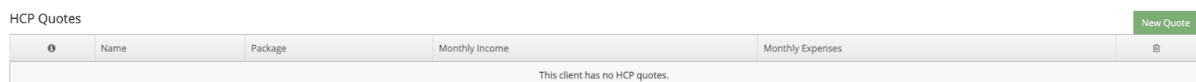
## Create a quote

To create a new HCP quote select a client from the client list and click on “View Details”.



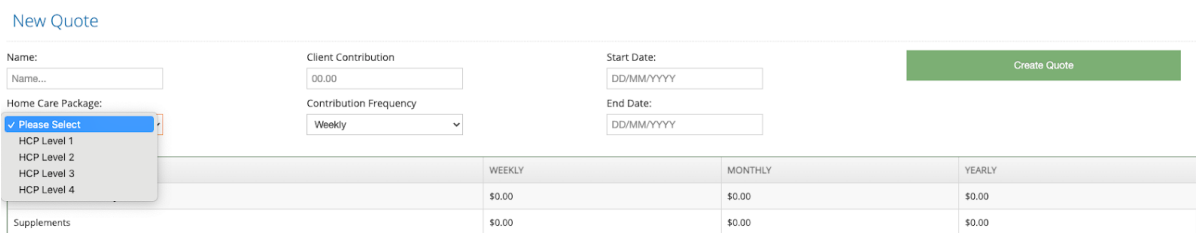
The screenshot shows the 'Clients' page with a list of clients. The client 'Apples, Terry' is selected, and the 'View Details' button is highlighted. The page also shows filters for 'All Services' and 'Only Active Clients'.

If you scroll down the client's information, there's an HCP Quotes section. Just click on “New Quote” on the top right-hand side.



The screenshot shows the 'HCP Quotes' section with a table. The table has columns for 'Name', 'Package', 'Monthly Income', 'Monthly Expenses', and a 'New Quote' button. The table is currently empty, and a message states 'This client has no HCP quotes.'

When creating a quote, fill out the “Name” and “Client Contribution”. Then, select a home care package (see how to manage HCP package levels below), the frequency and a start and end date for the quote.



The screenshot shows the 'New Quote' form. It includes fields for 'Name', 'Client Contribution', 'Start Date', and 'End Date'. There is a 'Create Quote' button. Below these fields is a table for 'Home Care Package' levels. The table has columns for 'WEEKLY', 'MONTHLY', and 'YEARLY'. The 'WEEKLY' column is currently selected.

|             | WEEKLY | MONTHLY | YEARLY |
|-------------|--------|---------|--------|
| HCP Level 1 | \$0.00 | \$0.00  | \$0.00 |
| HCP Level 2 | \$0.00 | \$0.00  | \$0.00 |
| HCP Level 3 | \$0.00 | \$0.00  | \$0.00 |
| HCP Level 4 | \$0.00 | \$0.00  | \$0.00 |
| Supplements | \$0.00 | \$0.00  | \$0.00 |

The client's income, such as commonwealth subsidy and client contribution will then be updated. The expenses, including administration and case management fees, will be shown just below the income.

| INCOME               | WEEKLY   | MONTHLY   | YEARLY     |
|----------------------|----------|-----------|------------|
| Commonwealth Subsidy | \$293.27 | \$1270.83 | \$15250.00 |
| Supplements          | \$0.00   | \$0.00    | \$0.00     |
| Client Contribution  | \$100.00 | \$433.33  | \$5200.00  |
| Income Test Fee      | \$0      | \$0       | \$0        |
| Total                | \$393.27 | \$1704.16 | \$20450.00 |

| EXPENSES            | WEEKLY | MONTHLY | YEARLY |
|---------------------|--------|---------|--------|
| Establishment Fee   | \$0.00 | \$0.00  | \$0.00 |
| Admin Fee           | \$0.00 | \$0.00  | \$0.00 |
| Case Management Fee | \$0.00 | \$0.00  | \$0.00 |
| Total               | \$0.00 | \$0.00  | \$0.00 |

To add services, select one option from the services list and add the number of hours per week or month. The services and prices will be listed according to the prices setup (under administration>services). You can add as many services as you want.

There's also an option to include miscellaneous expenses not included in the services list. Fill out the name, quantity, unit price and frequency (hours per week, hours per month or once-off) and the item will be added to the quote.

If you need to delete one of the items from the list, click on the red bin on the right-hand side.

| SERVICES  | WEEKLY | MONTHLY | YEARLY |                                  |
|---|--------|---------|--------|----------------------------------|
| <input type="text" value="Qty..."/> <input type="text" value="Hours Per Week"/> <input type="text" value="Please Select"/> <input type="button" value="Add"/> |        |         |        |                                  |
| Accompanied Activities (4.00x hours per week)   | \$0.00 | \$0.00  | \$0.00 | <input type="button" value="X"/> |
| Car Modifications (4.00x hours per week)  | \$0.00 | \$0.00  | \$0.00 | <input type="button" value="X"/> |
| Exercise Physiologist (4.00x hours per week)  | \$0.00 | \$0.00  | \$0.00 | <input type="button" value="X"/> |

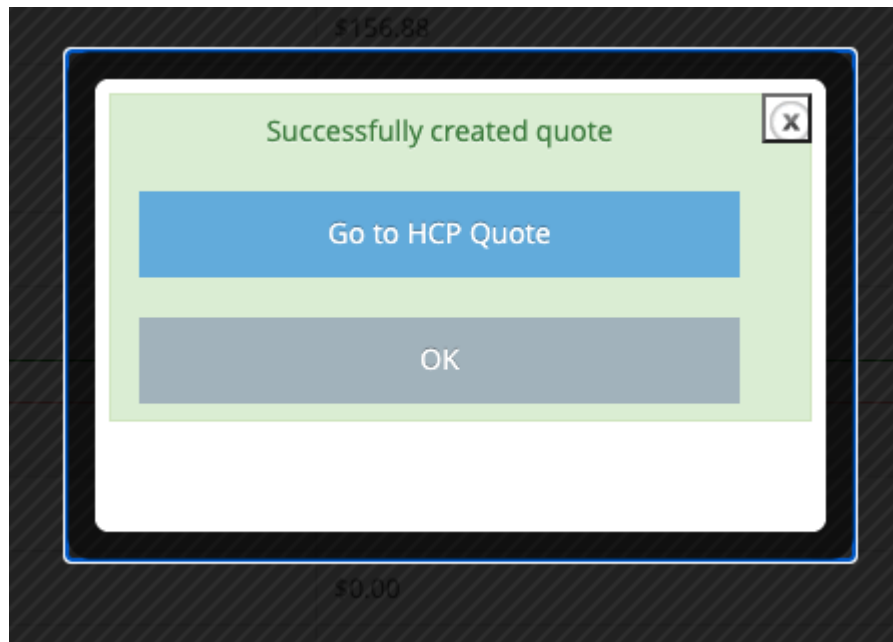
  

| MISC EXPENSES   | WEEKLY   | MONTHLY  | YEARLY      |                                  |
|---|----------|----------|-------------|----------------------------------|
| <input type="text" value="Name..."/> <input type="text" value="Qty..."/> <input type="text" value="Unit Price"/> <input type="text" value="Hours Per Week"/> <input type="button" value="Add"/> |          |          |             |                                  |
| test  | \$210.00 | \$910.00 | \$10,920.00 | <input type="button" value="X"/> |

When you add the services, the client's deficit/surplus per week, month and year will be automatically calculated.

| TOTALS            | WEEKLY   | MONTHLY   | YEARLY     |
|-------------------|----------|-----------|------------|
| Total Income      | \$393.27 | \$1704.17 | \$20450.00 |
| Total Expenses    | \$210.00 | \$910.00  | \$10920.00 |
| Deficit / Surplus | \$183.27 | \$794.17  | \$9530.00  |

Click on "create quote" on the top right side. A message will pop up when the quote is created and you'll be able to view it on the client's information.



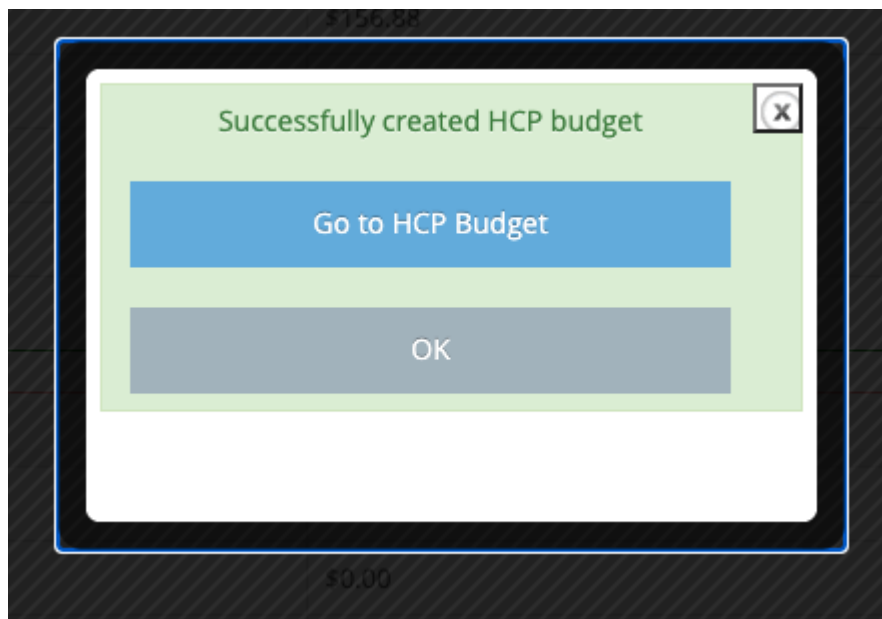
## Convert a quote to budget

Once the quote is ready, you can update it at any time and save it by clicking on the “Edit Quote” button. You can also convert the quote to an HCP Budget by clicking on the dark blue button.

### View Quote

|  |   |  |   |
|--|---|--|---|
| Name:<br><input type="text" value="test"/>                     | Client Contribution<br><input type="text" value="100.00"/>    | Start Date:<br><input type="text" value="22/04/2022"/> | <div>Edit Quote</div> <div>Print Quote</div> <div>Convert to Budget</div> |
| Home Care Package:<br><input type="text" value="HCP Level 2"/> | Contribution Frequency<br><input type="text" value="Weekly"/> | End Date:<br><input type="text" value="29/04/2022"/>   |   |

You can view the Budget by clicking on “Go to HCP Budget”.



On the budget page, you can include the client's opening balance and the purchase handling fee percentage.

Print Budget

Update Budget

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Opening Balance:

0.00

Purchase Handling Fee Percentage:

5

## HCP Statements

To create an HCP Statement, go to "Accounts" > "Client Statements" and click on "New Statement".

| Accounts            |
|---------------------|
| Accounts List       |
| Client Invoices     |
| » Client Statements |
| Provider Invoices   |
| Provider Statements |
| HCP Budgets         |

Accounts » List Statements

All Services

**Warning:**  
There are service outlets without email addresses.  
This can cause errors with emailing invoices from Polixen.  
Please add email addresses to all service outlets.

Start : 19/04/2022 End : 19/05/2022 Search

Search by Statement ID Statement ID Search

New Statement

| Select All                                      | Statement ID | Client | Emailed At | Statement Type | Date Issued | Total | Status |
|---|--------------|--------|------------|----------------|-------------|-------|--------|
| No Statements Issued In The Date Range Selected |              |        |            |                |             |       |        |

A new window will pop up where you can fill out information such as outlet, clients, service start and end dates and payment method.

S. n. Pol.

|                          |                 |               |                        |                |                      |               |        |
|--------------------------|-----------------|---------------|------------------------|----------------|----------------------|---------------|--------|
| Start: 19/04/2022        | End: 19/05/2022 | Search        | Search by Statement ID | Statement ID   | Search               | New Statement |        |
| Select All               | Statement ID    | Client        | Emailed At             | Statement Type | Date Issued          | Total         | Status |
| <input type="checkbox"/> | 21579           | Apples, Terry |                        | Printed        | Thursday 19th of May | \$424.65      | UNPAID |

## Office B

A.B.N. 123 456 789

Ph:

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Terry Apples  
88 Smith St  
Abbeywood QLD 4613

### Client Account Statement

|            |              |
|------------|--------------|
| Statement: | 21579        |
| Date:      | 19/05/2022   |
| Client:    | Terry Apples |

| Quantity | Description                             | Total    |
|----------|---|----------|
| 1x       | Government Subsidy Amount (HCP Level 1) | \$178.80 |
| 1x       | Government Subsidy Amount (HCP Level 1) | \$178.80 |
| 1x       | Government Subsidy Amount (HCP Level 1) | \$67.05  |
| 1x       | Opening Balance                         | \$0.00   |
| TOTAL:   |   | \$424.65 |

Office B  
A.B.N. 123 456 789  
Ph:

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### How To Pay

#### Direct Deposit

Bank Account:  
Bank:  
BSB:  
Account No:

To change the payment status of a statement, simply click on it and select the option “add the payment status”. If you choose the option “paid” or “partially paid”, you will then be able to select “apply credit” and enter the payment method before submitting the invoice.

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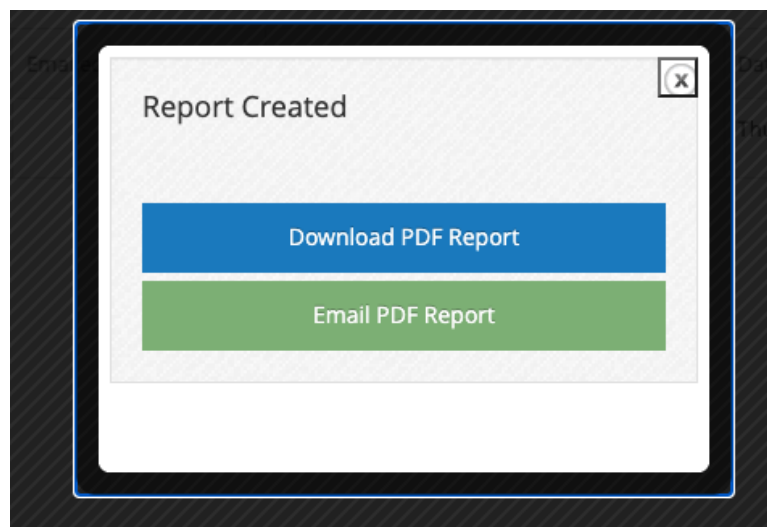
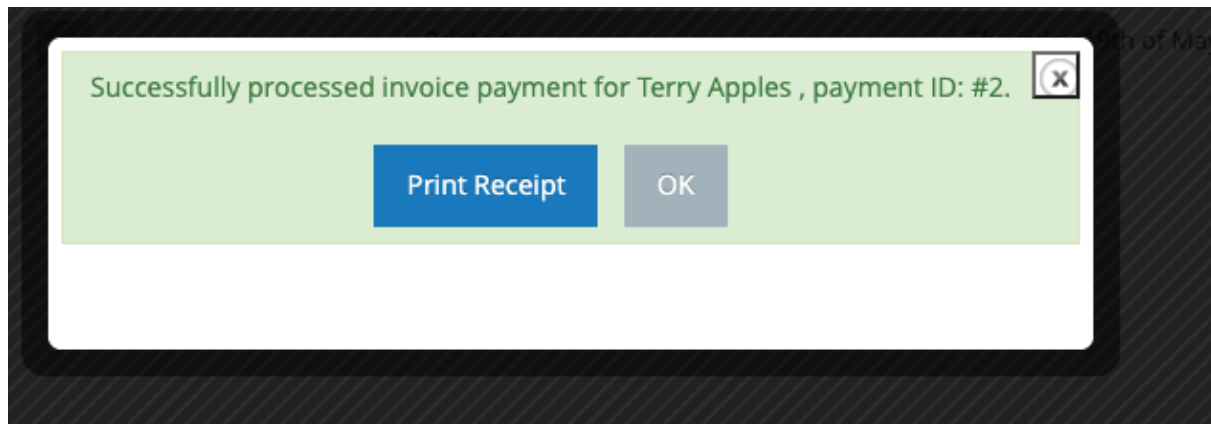
## Invoice Payment

|                 |                                     |
|-----------------|-------------------------------------|
| Invoice ID:     | 21579                               |
| Client:         | Terry Apples                        |
| Invoice Total:  | \$424.65                            |
| Payment Status: | PAID                                |
| Apply Credit:   | <input checked="" type="checkbox"/> |
| Credit Amount:  | 424.65                              |
| Credit Date:    | 19/05/2022                          |
| Payment Method: | Unspecified                         |
| Notes:          | Payment for Invoice #21579          |

Submit Invoice Payment


Once the invoice is submitted, you can choose to print the receipt or email it to your client.





## **HCP Statement reports**

To run an HCP Statement report, go to "Reports" > "Accounts" and select HCP Statement report.

|   |   |
|---|---|
|  Reports | ▼ |
| Meals on Wheels   | ▼ |
| Clients   | ▼ |
| Staff & Volunteers  | ▼ |
| Stock Control   | ▼ |
| » Accounts  | ▼ |
| ▶ Payment Summary Report  |   |
| ▶ Expense Summary Report  |   |
| ▶ Transaction Summary   |   |
| ▶ Outstanding Payments  |   |
| ▶ Aged Debtors  |   |
| ▶ Account Summary   |   |
| ▶ Money Collection Report   |   |
| ▶ Invoice Summary   |   |
| ▶ Total Account Summary   |   |
| ▶ Package Provider Summary  |   |
| ▶ Account Discrepancies   |   |
| ▶ Unpaid Invoices   |   |
| ▶ HCP Statement Export  |   |
| ▶ <a href="#">HCP Statement Report</a>  |   |

Select the services and start and end date for which you want to run the report.

[Accounts Reports](#) » Statement Report

**Statement Report**

This report generates a summary of client's HCP Statements within a date range, showing the totals of their Service hours, Administrative and Case management costs, expenses, other fees, and their unspent funds.

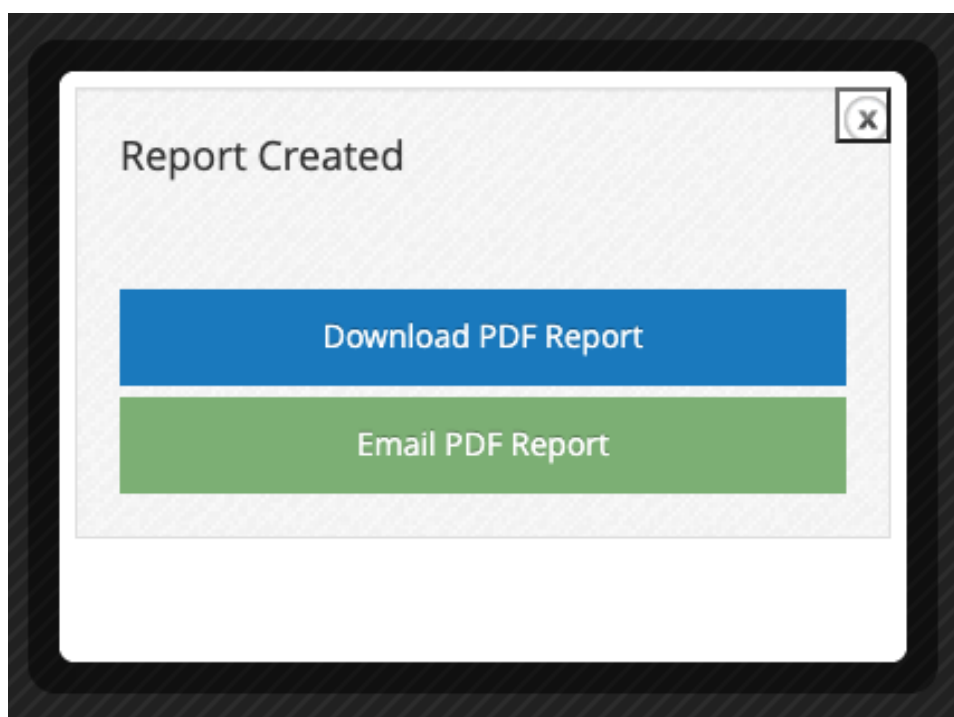
Service : All Services

Start : 01/07/2020

End : 30/06/2021

**Run Report**

Once the report is ready, there is the option to email or download the PDF.



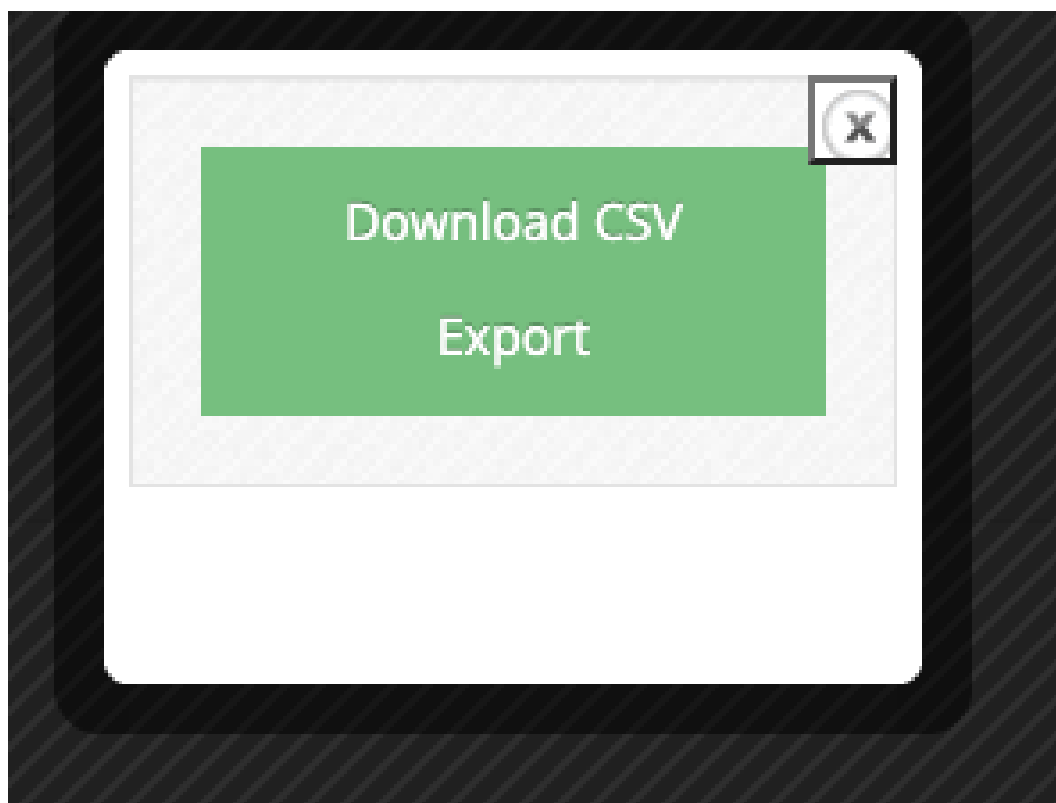
To export HCP Statements, go to “Reports” > “Accounts” and select “HCP Statement exports” (right above HCP Statement reports). Select a start and end date, then click on run report.

## HCP Statement Export Report

|           |               |
|-----------|---------------|
| Start :   | 02/04/2022    |
| End :     | 02/05/2022    |
| Clients : | All Clients ▼ |

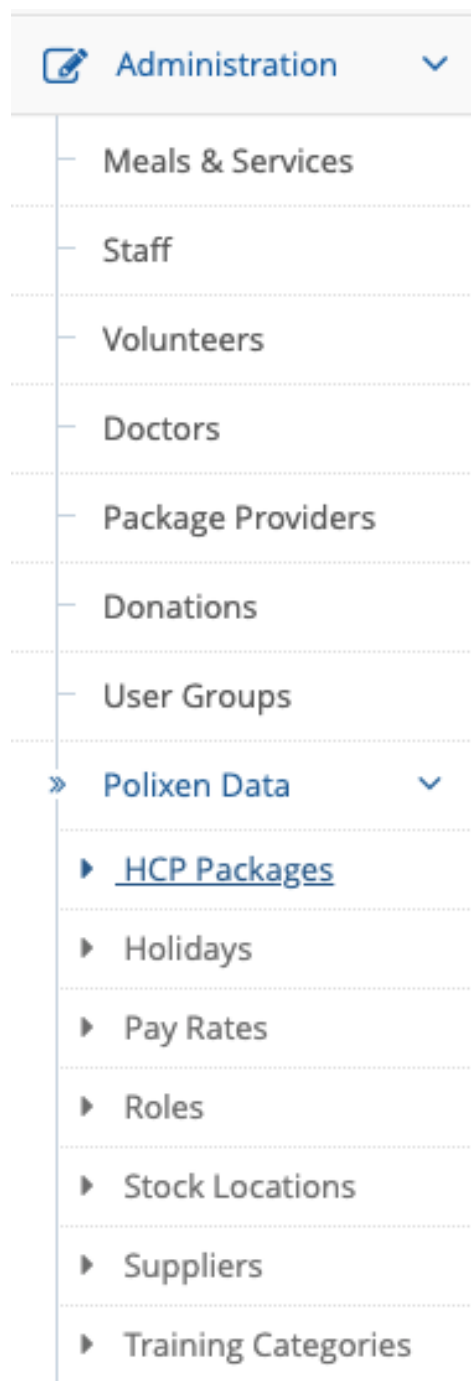
**Run Report**

The CSV file will be available for download.



## Manage HCP Package levels

To manage HCP Package levels, go to “Administration” > “HCP Packages”.



To create a new HCP Package, click on the green button “New HCP Package” on the top right-hand side.

| HCP Packages  |             | New HCP Package   |
|---|-------------|---|
|  | Name        |  |
|  | HCP Level 1 |  |
|  | HCP Level 2 |  |
|  | HCP Level 3 |  |
|  | HCP Level 4 |  |

This will open a page where you can fill out all the details of an HCP Level Package, including the yearly subsidy amount, exit fee, establishment fee, incoming tested fee, supplements, care management fee and package management fee.

Once the information is in, you can save it by clicking on that same green button on the right that says “New HCP Package”. This will save your new HCP Package and add it to the HCP Levels page.

| New HCP Package  |   | New HCP Package |
|--|---|-----------------|
| <div>Name:</div> <div>Name...</div>  | <div>Yearly Subsidy Amount</div> <div>Yearly Amount</div> <div>\$ 0</div>   |                 |
| <div>Exit Fee</div> <div>Yearly Amount</div> <div>\$ 0</div>   | <div>Establishment Fee</div> <div>Yearly Amount</div> <div>\$ 0</div>   |                 |
| <div>Income Tested Fee</div> <div>Yearly Amount</div> <div>\$ 0</div>  | <div>Supplements</div> <div>Yearly Amount</div> <div>\$ 0</div>   |                 |
| <div>Care Management Fee</div> <div>Yearly Fee</div> <div>\$ 0</div> <div>Percentage of Subsidy</div> <div>% 0</div> | <div>Package Management Fee</div> <div>Yearly Fee</div> <div>\$ 0</div> <div>Percentage of Subsidy</div> <div>% 0</div> |                 |

To view and edit existing HCP Levels, click on the blue ‘i’ icon on the left side. This will open a similar page to the one for creating new packages. You can edit any of the information and then save changes by clicking on “Edit HCP Package” on the top right side.

### Yearly Subsidy Amount

Yearly Amount

\$

### Establishment Fee

Yearly Amount

\$

### Supplements

Yearly Amount

\$

### Package Management Fee

Yearly Fee

\$

Percentage of Subsidy

%