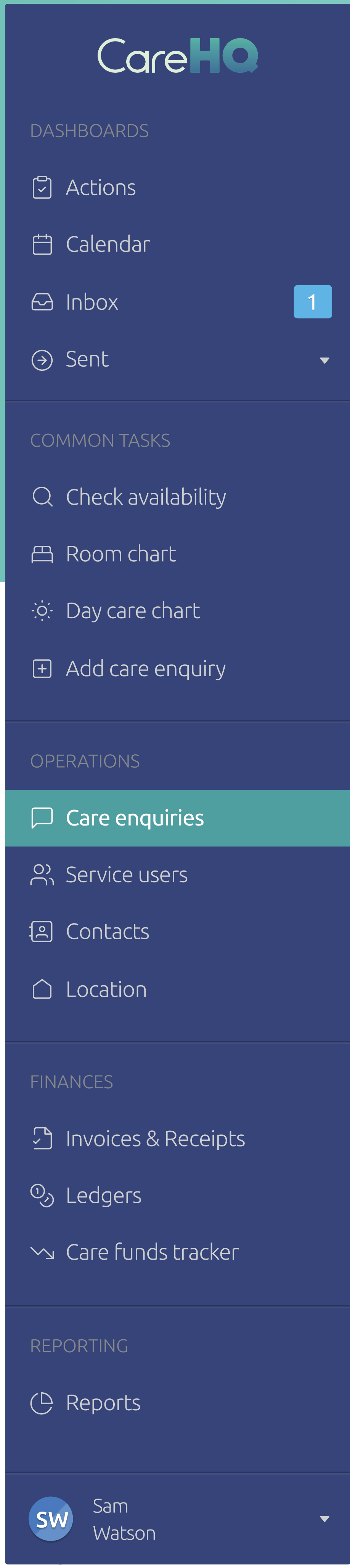
“love” “amazing” “fabulous”

All words clients use to describe CareHQ



Convert more care enquiries

Enquiry management is what we are known for and where it all starts. Smart workflows, automated actions, appointment reminders; we provide tools to make enquiry management effortless.

Manage your occupancy

A true booking system for the care sector that goes beyond simply the check in and checking out of residents. We bring room rates, budgets, and a host of resident tools to manage the admin.

Simplify invoicing & reconciliation

Petty cash, ledgers, automated invoice runs, credit note allocation, notifications when the billing contracts don’t match the admission rate... and so much more.

Use data to make better decisions

With over 30 real-time reports covering sales and marketing, occupancy and finance, resident demographics, and wider market data, empower your team to make better decisions.

CareHQ

Welcome more admissions

What is CareHQ?

CareHQ is Customer Relationship Management (CRM) software. It helps simplify everyday administrative tasks and provides tools to manage care enquiries, resident records, billing, and reconciliation in a care home setting.

What does CareHQ do?

CareHQ is a modular system, each module has a different purpose.

Care Enquiries – Helps the home to better manage care enquiries; smart workflows with task setting, record visits and assessments, track conversions and report on enquiries that close.

Resident Records – This module provides tools to manage occupancy and bookings, resident documents, expenses, absences, complaints and much more.

Day Care – Create a day care booking schedule and manage day care clients. Record their attendance, expenses, key contacts, documents, and billing.

Invoicing – Our invoice engine creates invoices to handle all the complexities the care sector has to offer including support for multi-billing parties, days after death, billing in arrears, mid period and advance to name a few.

Reconciliation & Aged Debt – Manage payment receipts, mass import transactions, allocate payment, create and apply credit notes where needed, run aged debt reports and more.

Reports – We have over 30 real-time reports covering areas including sales cycle, enquiry sources, occupancy, average weekly fee, recent admissions, aged debt and much more.

How much does it cost?

CareHQ costs £150.00 + VAT per month, per home for the full system on a rolling 30-day agreement. Discounts are applied for length of contract:

12 months	**£142.50**	per home, per month
24 months	**£135.00**	per home, per month
36 months	**£127.50**	per home, per month

Our fee includes unlimited user licences, product set up, training, ongoing support, and future product updates.

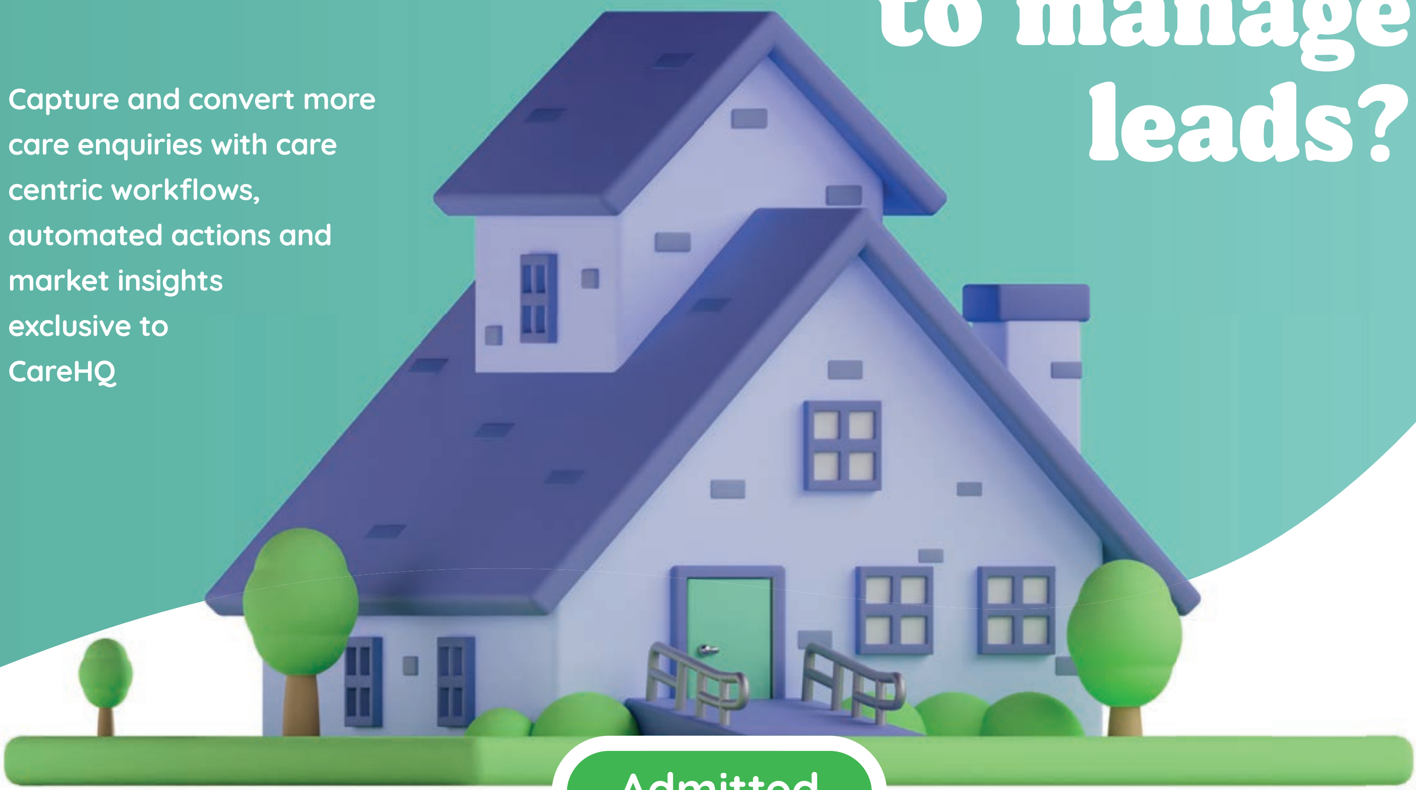
Do I need to install it on my computer?

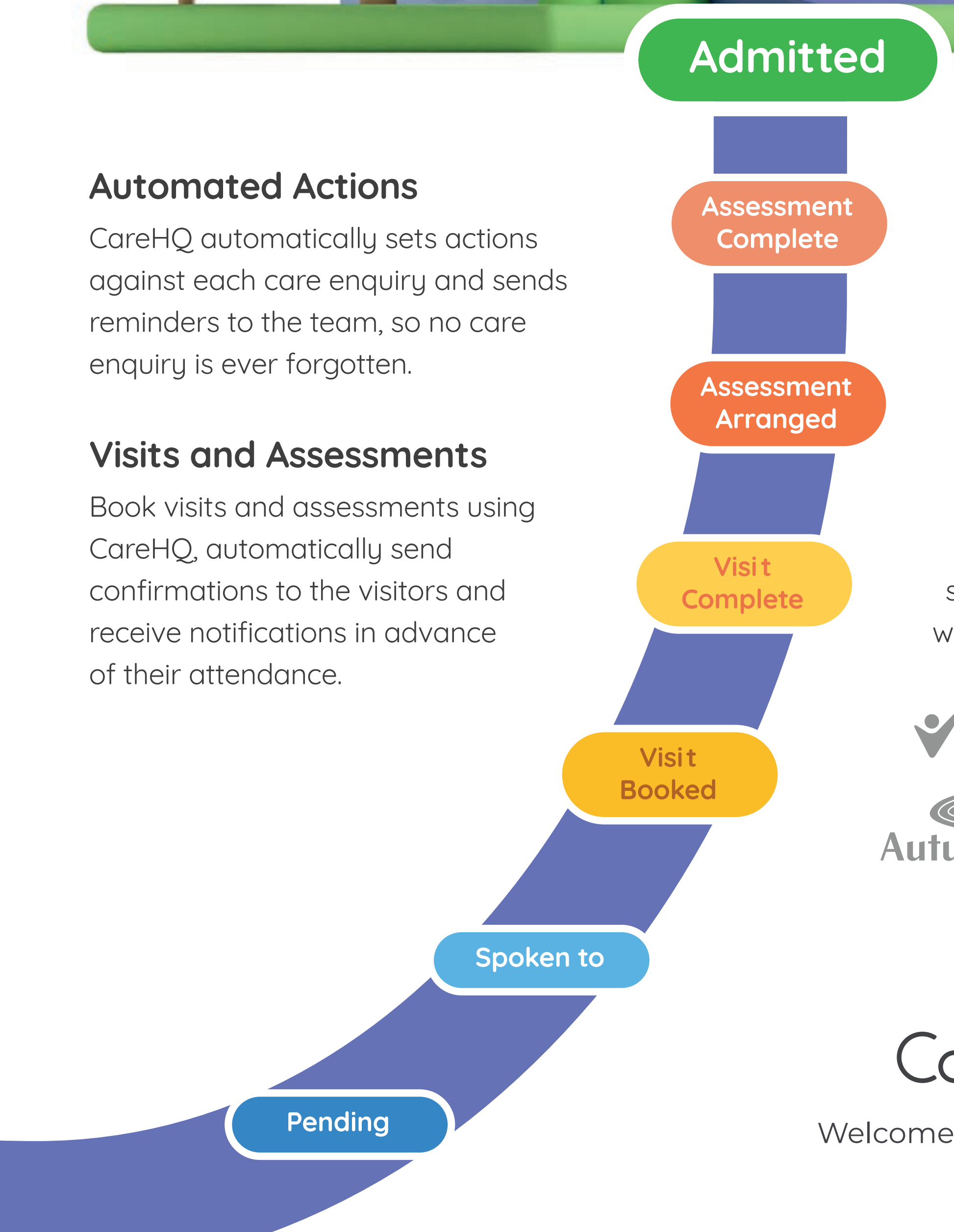
No, CareHQ is cloud based. This means you can access the system from any device with an internet connection such as desktops, laptops, tablets, and smart phones.

CareHQ®

Using a spreadsheet to manage leads?

Capture and convert more care enquiries with care centric workflows, automated actions and market insights exclusive to CareHQ





Automated Actions

CareHQ automatically sets actions against each care enquiry and sends reminders to the team, so no care enquiry is ever forgotten.

Visits and Assessments

Book visits and assessments using CareHQ, automatically send confirmations to the visitors and receive notifications in advance of their attendance.

Smart Workflows

Our smart workflows clearly define where each enquiry is in the process and what the next step should be.

Fully integrated

CareHQ CRM integrates with leading referral platforms, email marketing systems, and provides tools for website webform integration.

trustedcare mailchimp Autumna carehome.co.uk

CareHQ

Welcome more admissions

What makes CareHQ different from other CRMs on the market?

Most CRMs in the care industry started life as an accounting system and then worked backwards to care enquiries...

CareHQ is different; it has been created by the team behind TrustedCare, who have been managing thousands of care enquiries each month for over 10 years, for care providers both large and small.

This has given us a unique opportunity to bring this experience and knowledge into a product that is simple to use, encourages engagement, and is designed to help homes convert more leads.

What kind of enquiry reports can I run from CareHQ?

CareHQ has over 30 different live reports care providers can use, all visually informative and available for download as PDF, CSV, or Excel. The reports most useful for enquiries are:

Acquisition - How many enquiries you have received and where they have come from.

Sales Cycle - This report does what it says, it shows your sales cycle through to conversion.

Closed leads - Shows why your enquiries have closed and links to them for deeper analysis.

Geography - Plots your enquiries on a map, great for understanding local reputation.

Sales Pipeline - What enquiries you have in the pipeline and at what stage.

Recent Admissions - This report shows how fees for recent admissions compare to weekly target rates.

Does CareHQ integrate with our website?

Yes, CareHQ provides tools via our API to connect to your care provider website so enquiry forms are automatically added to your CareHQ account.

Alongside this we also have integrations with marketplace websites including CareHome.co.uk, TrustedCare and Autumna.

A lot of our enquiry management is done via email, especially with Social Workers, won't I end up with information in many different places?

Not if you use the CareHQ email system. Users can send and receive emails with care seekers (including social workers) and receive replies directly into the platform.

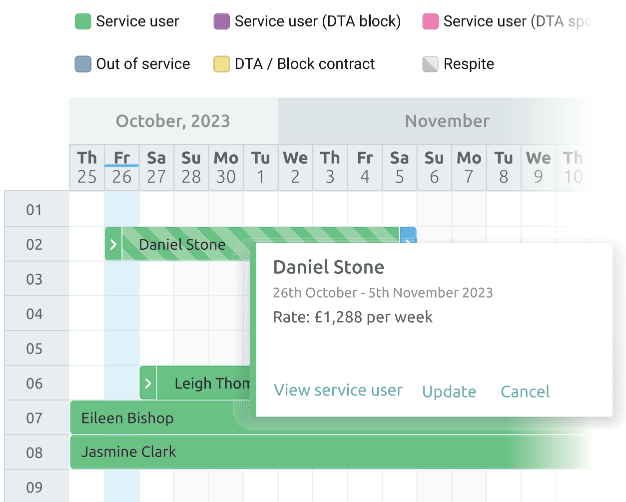
All messages are automatically filed against the corresponding enquiry record, so everyone has oversight. You can also upload documents, including emails, to enquiry records so there is a single source of information.

My homes are busy places, does the team need to be logged into CareHQ all day?

No, CareHQ will send notifications via email, SMS and even WhatsApp about upcoming appointments such as visits to the home and tasks that need completing.

Remembering the resident's name: priceless. For everything else, there's CareHQ

CareHQ helps you stay on top of the everyday; manage permanent, respite or day care bookings, upload contracts, monitor FNC applications, track resident care funds, set up key contacts, send emails, log expenses, record absences and flag complaints.



Manage bookings

The CareHQ booking system allows you to manage resident bookings like the very best of hotels. Permanent, respite, day care, CareHQ has you covered.

Record important events

CareHQ allows you to record when a resident is absent from the home, or when a complaint is received.

Sundries and expenses

Each resident record in CareHQ has its own expenses ledger so payments can be recorded for items like toiletries, hair cuts and days out. All exportable with statements available for download.

Keep on top of documents

Our required documents feature allows homes to build a list of documents each resident record must have such as contracts, or direct debit forms, and will let you know when you are missing them.

CareHQ

Stay on top of the everyday

Am I able to add a resident into the home in advance, or does it have to be done on the day they arrive?

Yes, CareHQ allows you to book residents into the home in advance. Their record will be marked as a 'Pending' admission until their arrival date is reached. It is also possible to add them on the day they arrive, or retrospectively if it has been one of those weeks.

If we have someone who has stayed for respite come back to the home, do I need to add a new record or can I reopen their old record?

All you need to do is create a new booking against the existing resident. This way you keep a record of their stays at the home; the rooms they used, rates they paid, key contacts, documents, absences, and other important information all in one place.

How easy is it to convert a respite resident to a permanent resident? Do I need to create a separate record?

It is very easy, with no need to create multiple records. All respite residents have a 'convert to permanent' button. All you need to do is enter the date of the conversion and a new weekly rate if their fee has changed, then click save. We keep a record of their respite booking (room, rate, and date) alongside their now permanent booking, so their full history is clear.

Do care enquiries and resident records link?

Yes, if you add a care enquiry and then convert it over to a resident then the two records link. If you view the admitted enquiry record, you can click through to the resident record. Likewise, if you view the resident record, you can click through to the original enquiry.

Furthermore, we copy everything that was captured and added to the enquiry record across to the new resident record, including comments, documents, and key contacts, so no information is lost.

How long do you keep records in the system?

Our default setting is 7 years from the point the record is closed, at which point the system will anonymise the record information. However, this can be changed in line with our users' data retention policies.

Invoicing used to be complex

Automate invoice runs, get notified of billing discrepancies, manage petty cash and expenses, and export to Xero, Sage, Quickbooks, Open Accounts and Tradeshift.

xero intuit sage Tradeshift

Complex billing rules

Bill self-funders in advance and Local Authorities or ICBs in arrears, or mid period, all on different dates with different payment types.

Billing discrepancies

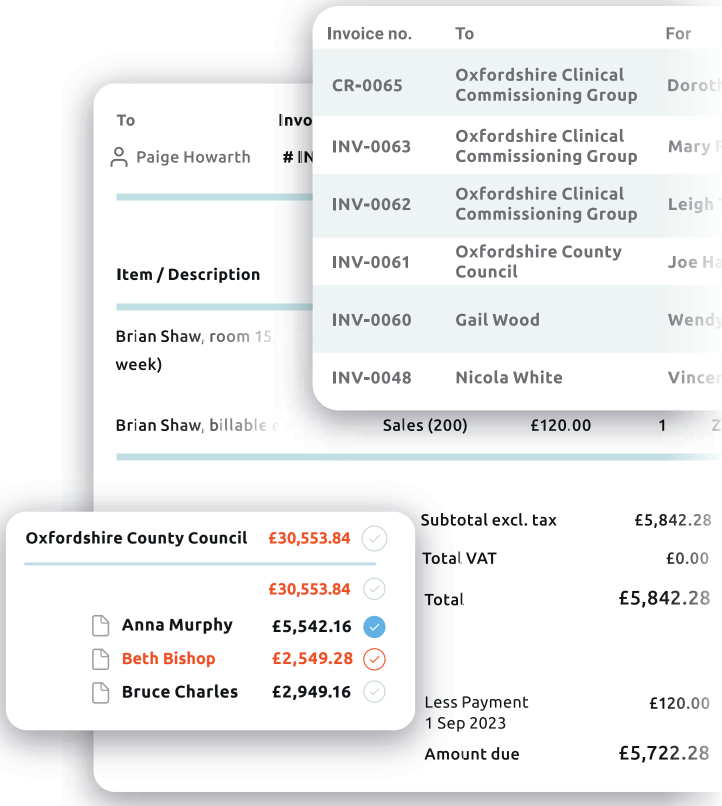
CareHQ will identify billing discrepancies and flag where the contracts in the system do not match a resident's agreed weekly fees.

Expenses and Petty Cash

Manage the home's petty cash and resident expenses ledgers, report on transactions and receive automated notifications when ledger balances reach set limits.

Update fees en masse

A simple way to easily apply annual fee uplifts to both resident weekly rates and active payment contracts all from one user friendly interface.



CareHQ

No more billing discrepancies

What billing processes does CareHQ offer?

We support billing in advance, billing in arrears and billing mid-period. Alongside each process users can set if the period is monthly/weekly/daily and the frequency of each. We also provide support for 4-4-5 weekly billing cycles.

Am I able to create a one-off invoice using CareHQ, or do invoices have to be part of a billing run?

Yes, you can create one-off invoices for things like deposits or sundry items as required.

Does CareHQ integrate with TradeShift?

Yes, CareHQ integrates with TradeShift for both invoicing and credit notes.

In our accounts we track different funding sources and income from deposits separately, how does CareHQ support this approach?

CareHQ allows users to create a list of nominal codes and apply them to different funding, expense, or account types. Nominal codes are included as part of the invoice to accounts export via CSV, Excel, or API.

What accounting packages do you work with?

We provide invoice exports to accounting packages including Sage, Xero, Intuit QuickBooks, and OpenAccounts (due Dec 2023).

We have different days after death billing rules depending on who is funding, does CareHQ support this?

Yes, like with invoice templates these can be set at a contact or contract level. This means if you have an agreement of 2 days after death billing for a council, any contracts related to the council will automatically allocate additional days to the invoice beyond the deceased date.

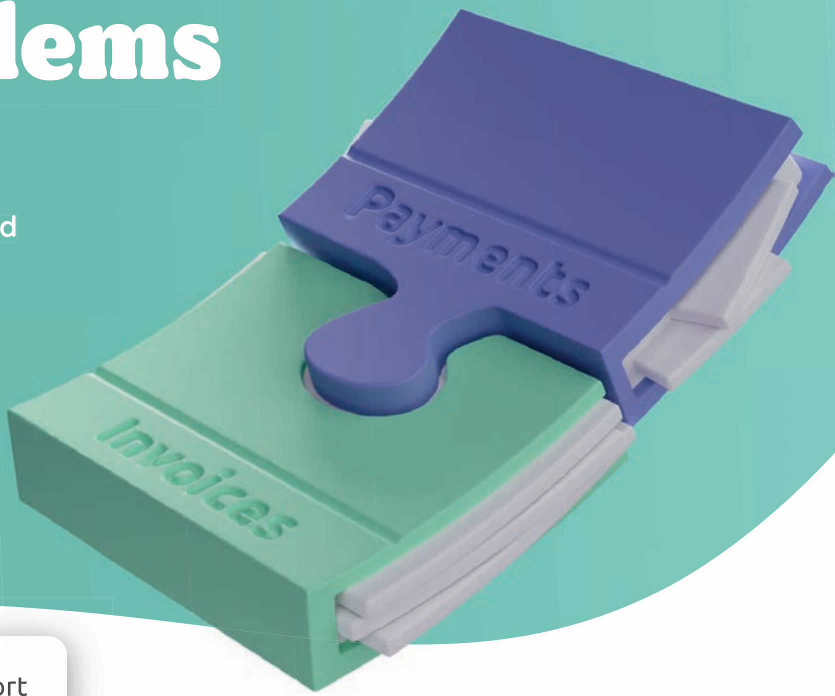
We have different invoice templates for Local Authorities who prefer less information on the invoice about the individual, how does CareHQ support this?

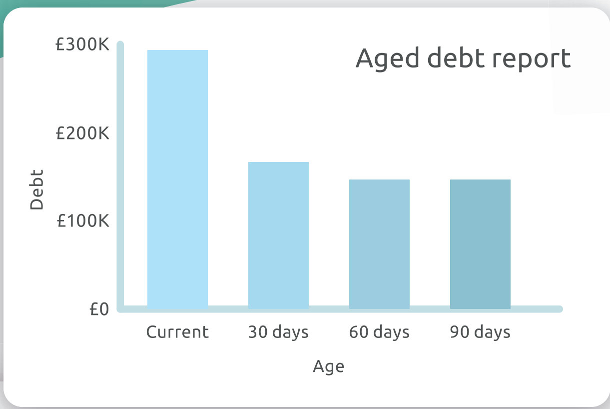
Each billing party can have their own invoice template with a custom line-item description. Once the invoice template has been created, all future invoices will follow the structure with no need for manual adjustment. It is easy to edit the template and you do not need tech support to make changes.

More money, fewer problems

CareHQ makes it simple to bulk import and reconcile transactions from your bank statements with smart matching of payments to outstanding invoices.

OpenAccounts





By location

Location	Total debt	Current	30 days	60 days	90 days
Douglas Court	£494,433.34	£183,170.88	£160,093.84	£151,168.62	£0.00
Upton House	£114,778.29	£114,778.29	£0.00	£0.00	£0.00
	£160,211.63	**£297,949.17**	**£160,093.84**	**£160,093.84**	**£151,168.62**

Smart invoice matching

Our smart payment matching automatically suggests invoices for reconciliation by amount, payee, invoice or reference number, saving you time searching.

Bulk upload bank statements

Upload thousands of payments (or refunds) to CareHQ in seconds using your bank statement or by populating an import template.

Report on aged debt & accruals

View an array of detailed financial reports including aged debt, accruals and prior period adjustments which can be viewed at organisation, region or location level and filtered by period, funding source and funder group.

Keep track of disputes

Mark invoices or accounts as in dispute (along with a reason why) then keep track of and update the status of open disputes via the In dispute report.

CareHQ

Stay on top of the everyday

Do I need to enter each payment receipt separately or can I add multiple at once?

Both options are available; however, for ease we would recommend using our importer which allows for up to 10,000 payment receipts, or refunds, to be uploaded in one go from a bank statement.

Sometimes families or funding authorities dispute our invoices, does CareHQ have a way to track this?

Yes, invoices can be marked as 'in dispute' and given a reason as to why, this puts a clear flag against the invoice in question, marking it off in red.

A live management report is available showing the number of invoices in dispute, their value and funding type. The report can be viewed company wide, by region, or by home.

We have a separate bank account for each home, does CareHQ support this?

Yes, it is easy to set up multiple bank accounts within CareHQ, then when payment receipts are added you can assign them to the relevant bank account.

Sometimes local authorities send through a payment which wasn't meant for us, how does CareHQ deal with this?

Payment receipts can be allocated to an account rather than an invoice while their purpose is established. Balances can then be allocated to invoices and a history of the transaction movement is recorded within CareHQ.

Do payments on account automatically get deducted from outstanding invoices?

No, payments on account are payments on account, not reconciled transactions.

Our Aged Debt report shows only outstanding invoices (by home, resident, billing party etc.) and does not merge payments on account with balances owed.

Am I able to see aged debt by funding source?

Yes, our aged debt report allows you to filter outstanding debt by funding source e.g. Local Authority, ICB, private pay etc.

Can homes see outstanding invoices for residents?

Yes, with invoicing and reconciliation enabled within your CareHQ account, homes can see invoices paid and outstanding within the resident record.

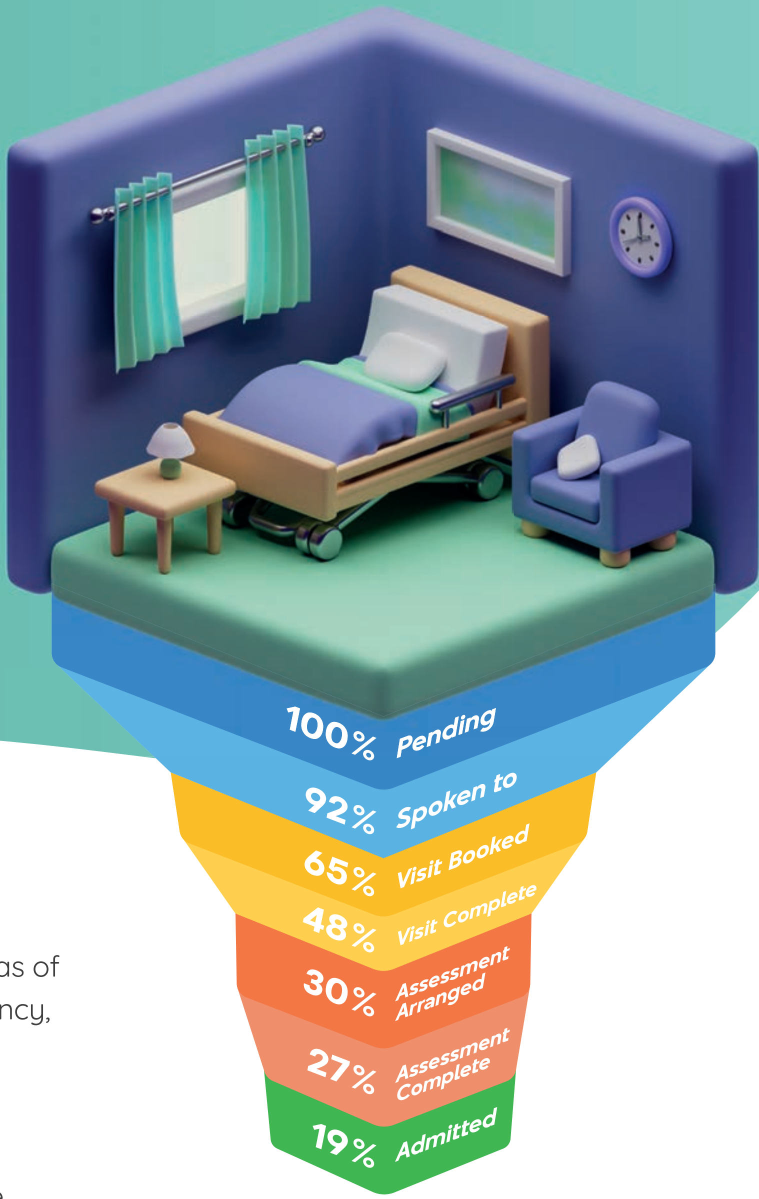
Can I export to OpenAccounts or other ledgers?

Yes, CareHQ provides an OpenAccounts export for the general ledger and cashbook. Support for exporting to Xledger is also in the works.

50+ Real-time

Graphic reports you can export to Excel, CSV and PDF

CareHQ reports are compiled from real-time data and load instantly (even if you have over 300 homes). Perfect for the detail-orientated or anyone who hates pivot tables.



All areas covered

CareHQ has over 30 unique reports covering areas of the business including sales & marketing, occupancy, residents, finance, and wider market trends.

Dig into the details

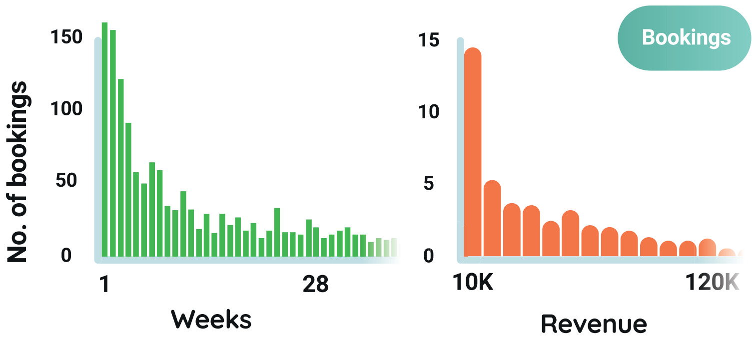
All reports in CareHQ can be filtered by care type, funding type, stay duration and many more metrics.

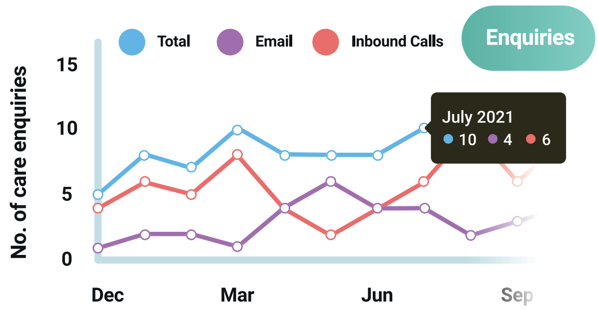
See the changing picture

It's no secret, we hate pie charts. Our reports allow you to see trends over time and model data by days, weeks, months, or years.

At company, region or home level

Our reports can be viewed at different levels of the organisation and are only available to users with those permissions.





CareHQ

Perfect for the detail-orientated

What reports does CareHQ have?

Well, we have over 50 including...

Target metrics
Set target metrics for KPIs across your organisation allowing locations and regions to track their progress.

Acquisition
Track the volume and conversion rate of care enquiries by sales channel and referrer.

Closed reasons
View a breakdown of the reasons care enquiries close without placing.

Care funds tracker
Track the balance of resident care funds and forecast the date funds will run out.

Geography
Plot the geographic location of care seekers to discover areas of demand.

Location (care home) performance
Compare key performance metrics for sales and revenue across care homes.

Sales cycle
Track your conversion rate and identify where in your sales journey care enquiries are lost.

Sales pipeline
Review the stage of all active care enquiries within the sales pipeline.

Billing discrepancies
Pinpoint and resolve billing discrepancies across your organisation.

Billing review
Compare the estimated amount to bill with the amount invoiced for a given period.

Average stay
View the average length of stay and revenue generated for residents over any given period.

Aged debt
View outstanding debt by age at care home, group and organisation level.

Weekly rate
Track the average weekly rate across your care homes and forecast future rates.

Recent admission rates
Track recent admission rates against target room rates.

Room performance
Review the occupancy achieved and revenue generated for individual rooms.

Admissions, deaths & discharges
View the number of admissions, discharges and deaths for any period.

Day care bookings
View the number of day care bookings and the revenue they generated for any period.

Billing schedules
Review billing schedules and revenue by funding body.

Accruals
View the revenue overbilled and underbilled as well as prior adjustments for a given period.

FNC applications
Review the status of FNC (Funded Nursing Care) applications across your care homes.

Invoices in dispute
View a breakdown of invoices currently in dispute across your organisation.

Occupancy
Track and forecast occupancy levels across your care homes.

Complaints
View a breakdown of complaints received by outcome, subject matter and location.

Fire sheet
View a list of current residents at a location and details of any absences.

Care enquiries per location
Compare the volume of care enquiries your locations receive against the market.

Referrer performance
Compare the performance of your referrers against the market.

Missing documents
View the details of residents that are missing required documents.

Funding at risk
View residents with funding at risk across your organisation including the total weekly revenue at risk.

Birthdays
View a list of birthdays for service users as well as the distribution by month.

TV (ARC) licence
View details required for an Accommodation for Residential Care TV licence application.

Data capture
Track the accuracy of care enquiry data captured by your users.

What if I cannot find what I am looking for?

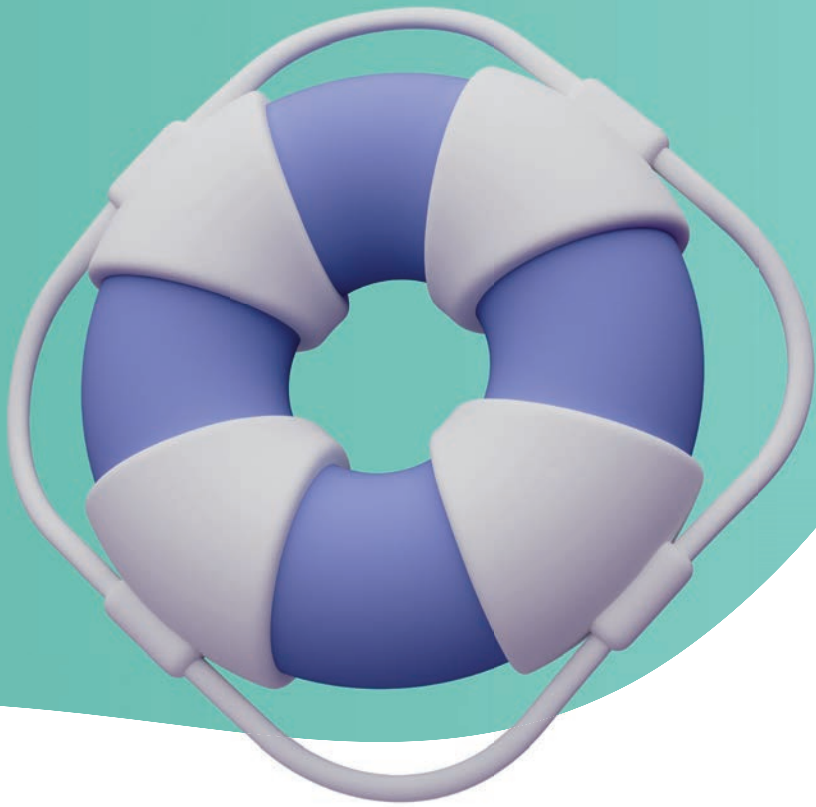
If we hold the data, we can likely report on it. Partners frequently request new reports from the system. If we feel the report would have global benefit to all partners, we are happy to build it.

Many partners also take advantage of CareHQ's API to pull data into their data warehouse for further analysis and reporting.

CareHQ®

Set up, training & support

We take the hassle out of set up, train your team on site and provide ongoing support - all this within the cost of your subscription.



On-site set up & training

We'll set up each of your homes on CareHQ, help you import your existing data, onboard your team and provide on-site training (we also offer a remote option).

Breaking up is (not that) hard to do

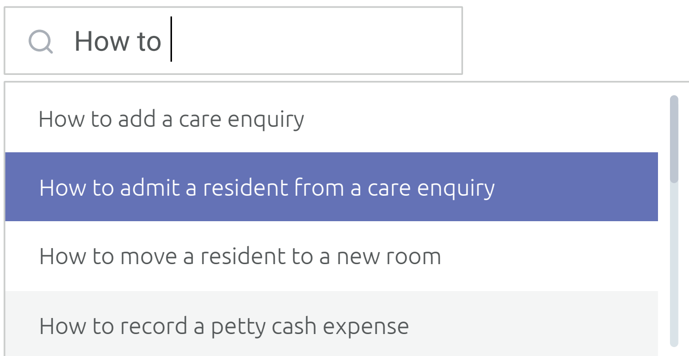
We've helped clients move to CareHQ from **Found** (by Lottie), **Coldharbour**, **CoolCare4**, **CareMaster**, **Fusion**, **Caresys** and of course (good old) spreadsheets. No matter what CRM you're moving from, we'll help ensure your move to CareHQ is a smooth one.

Support whenever you need it

Anytime you need help you can talk to your dedicated account handler or one of our support team. We provide telephone and email support between 9am – 6pm, Monday to Friday.

Online resources

Users can access over 75 online video guides as well as a growing set of how-to articles covering every aspect of CareHQ on our website. We also provide demo accounts to allow users to learn and try out features without affecting live data.



CareHQ®

Hassle-free set up and help moving from your current CRM

Anyone can claim their platform is secure

So when we claim CareHQ is secure we back that up with relevant certifications for ISO27001: 2013 and Cyber Essentials Plus along with publishing the results from our annual pen test.

Independently verified

CareHQ is certified as ISO27001: 2013 and Cyber Essentials Plus compliant and undertakes annual pen testing by CREST certified security professionals. Want to view our latest pen test result? We are (very) happy to share a copy.

Access control

CareHQ provides role and scope based data controls. Further we provide strong authentication features including checking passwords on sign-in to detect if they have been breached and app based multi-factor authentication.

Auditing

Every change in CareHQ is recorded in a change log. We store details of who made the change, when it happened, and what was changed.

Data encryption

Access to CareHQ is over a secure connection (HTTPS), and all data is encrypted both at rest and whilst in transit.

Designed to be resilient

CareHQ is hosted across multiple EU countries and service providers. In the event of a server failure traffic is automatically routed to healthy servers. Client databases are replicated across multiple servers in real time to ensure data is always available and hourly, daily and monthly server snapshots are taken.

Export logging and notifications

Whenever data is exported from CareHQ we record who exported the data, when and what data was exported. We also notify key users such as data protection officers.

CareHQ

Sleep better knowing your data is safe