Kingsley HEALTHCARE

Care Compass System Journey

Participant Name:

Date:

JANUARY 2026
Version 1.1 [INTERNAL RELEASE]

Lead Capture

Structured Data Capture

1. Lead Details
2. Enquirer's Details
3. Care Seeker (Prospective Resident), Care Requirement including Dementia/Cognitive Behaviour related details (If Applicable) and Timeline Details
4. Mobility Details
5. Additional Support Requirement Details
6. Funding Details
7. GP Details

a.Additional Comments Notes

9. Communication Preferences
10. Lead Tracking Details

Important Lead Details

1. Lead Channel
2. Lead Source
3. Lead Type
4. Care Home
5. How did you hear about us?

Manual Lead Entry

- **By Home Team**

1. Walk-ins
2. Direct Referrals to Home
3. Out-of-Hour Calls to home
4. Emergency Admissions

Note: Change lead owner to your home name when creating a lead manually, if required

- **By Care Advisory Hub**

1. Some Referral Partner Leads

Lead Management

Lead Validation | Lead Qualification | Showround Booking | Lead Conversion

1. Lead Type > Validate
2. Invalid Lead > Closed-lost

1. Creating Leads
2. Creating Accounts (Individual & Business)
3. Creating Contacts (External Referrals & Staff Members)

Lead Management

Lead Validation | **Lead Qualification** | Showround Booking | Lead Conversion

Valid Care Leads

1. Mandatory Information
2. Dementia / Cognitive Behaviour (If Applicable)
3. Optional/Supplementary Information
4. Lead Qualification

Is this an Emergency Admission?

Flag, Skip Showround and go to Assessments

Lead Management

Lead Validation | Lead Qualification | **Showround Booking** | Lead Conversion

Qualified Leads

>>> Book the showround via Global Actions

Book A Showround

1. Use **"Global Actions"** > Book Showround
2. **Mandatory**
   a. Start Date & Time
   b. End Date & Time
   c. Name > Leads > Enquirer Name
   d. Conducted by (Staff? or User?)
3. **Optional**
   a. Description
   b. Reminder Set (Default 15 Mins)
   c. Tick "Historical Event" if applicable
4. **Do not use >** "Related To"

Guidance Note:

A Showround has been booked, please convert

Lead Management

Lead Validation | Lead Qualification | Showround Booking | **Lead Conversion**

Pre conditions:

1. A Qualified Lead
2. Showround Booked

Convert to an opportunity using **"Convert"** action button

Lead Conversion Outcomes:

1. **An Opportunity Record** for the "Care Seeker / Prospective Resident"
2. **A Person Account** for the Enquirer

Contact Roles within Opportunity:

1. Enquirer
2. Care Seeker
3. Other
   a. Next of Kin
   b. Power of Attorney
   c. GP

Key Functionalities & Tools

1. Daily Digest Email
2. Calender & Tasks
3. Accounts & Contacts
4. Guidance & Warning Notes
5. Orange Tablet

Opportunity Management

Showround | Assessment | Pre Contract | Contract | Admission

Pre Showround | Showround | Post Showround

Complete Pre Showround Checklist (Opportunities > Showround > Pre-Showround Checklist)

1. Use **Orange Tablet**/Care Compass to complete the checklist and "Save".

2. Mark **"Complete the Pre-Showround checklist"** task as completed in Care Compass.

Reschedule a Showround:
Showround Info > Update showround outcome as "Rescheduled" > Add new date & time

Opportunity Management

Showround | Assessment | Pre Contract | Contract | Admission

Pre Showround | Showround | Post Showround

Conduct the Showround

Opportunity Management

Showround | Assessment | Pre Contract | Contract | Admission

Pre Showround | Showround | Post Showround

Complete the Post Showround Feedback
(Opportunities > Showround > Post-Showround Checklist)

1. Use **Orange Tablet**/Care Compass to complete the feedback and "Save"
2. Mark **"Complete the Post-Showround checklist"** task as completed in Care Compass.
3. Update the **Showround Outcome** and "Save".
4. Opportunity moves to **Assessment Stage** automatically (if Outcome = Successful & Outcome Reason = Assessment Agreed)

Guidance Note:

Add Funding Contributions via Manage Funding Contributions Button & Complete Financial Assessment via Assessment Tab

Opportunity Management

Showround > **Assessment** > Pre Contract > Contract > Admission

Clinical Assessment > Financial Assessment

>>> Book the Clinical Assessment via Global Actions

Book A Clinical Assessment

1. Use **"Global Actions"** > Book Clinical Assessment.
2. **Mandatory**
   a. Start Date & Time
   b. End Date & Time
   c. Related To > Opportunity > Care Seeker Name
   d. Assessment Location
   e. Conducted by (Staff? or User?)
3. **Optional**
   a. Description
   b. Reminder Set (Default 15 Mins)
   c. Tick "Historical Event" if applicable

Guidance Note:

A Clinical Assessment has been scheduled. Once conducted, update the Clinical Assessment Outcome and Location Details

Conduct the Needs Assessment in Nourish using **Blue Tablet** *(Or any Nourish Device or a Laptop)*

Update the assessment outcome and the Assessment Location Address (If Applicable) in care compass and "Save"

(Opportunities > Assessment > Clinical Assessment)

Reschedule a Clinical Assessment:
1. Go to **"Calendar Tab"** > Click on Assessment Event > **Edit >** Add New Date & Time > Save

Opportunity Management

Showround | **Assessment** | Pre Contract | Contract | Admission

Clinical Assessment | **Financial Assessment**

>>> Complete the Financial Assessment
(Opportunities > Assessment > Financial Assessment)

Prepare for Financial Assessment

1. Identify Who is paying What?
2. Create relevant Individual Accounts. (if required)
3. **Add "Contact Roles"** to the Opportunity record using "Create Contact Roles" action button (Top Right, Below the Nav Bar)

Conduct the Financial Assessment

1. Weekly Contribution > Add Funding/Pay Elements using "Manage Funding Contributions" action button (Top Right, Below the Nav Bar)
2. Assessor (Staff? or User?)
3. Funding Details
4. Proof of Funding
5. Deposit Details
6. Financial Assessment Outcome and "Save"

Mark Assessment Stage as Complete

Opportunities > Assessment > **"Mark Stage as Complete"**

The Opportunity moves to **"Pre-Contract"** Stage

(Opportunities > Pre-Contract)

Opportunity Management

Showround | Assessment | Pre Contract | Contract | Admission

Stay | Review Contract Details

>>> Book a Room
using Action Button (Top Right, Below the Nav Bar)

Book a Room
1. Opportunity Information (Automated)
2. Stay Information (Type & Planned Admission Date)
3. Select the Room
4. Book

Book a room Outcome:

1. Stay record is created against the opportunity
2. Status = Prospective

Verify Stay
(Opportunities > Pre-Contract > Stay)

- Review Stay information

Opportunity Management

Showround | Assessment | **Pre Contract** | Contract | Admission

Stay | **Review Contract Details**

>>> Review each Contract
(Opportunities > Pre-Contract > Review Contract Details)

1. Review each contract > Amend the opportunity record / Contact Details / Fee Information if required and check to make sure all are accurate.
2. Accept > Next

The Opportunity moves to **"Contract"** Stage
(Opportunities > Contract)

This will trigger task for the Care Advisory Hub to Initiate the Contract Signing Process.

Opportunity Management

Showround | Assessment | Pre Contract | **Contract** | Admission

>>> Confirm the Deposit in Care Compass (Opportunities > Contract > Contract)

Has the deposit been received? Y/N and "Save"

PHASE 01
Generate Contracts via DocuSign

PHASE 02
Automated Process within Care Compass

Opportunities > Contract

Mark Stage as Complete > Stage > Admission > Done

Opportunity Management

Showround > Assessment > Pre Contract > Contract > **Admission**

On Admission Date:

Admission Stage > Mark Stage as Complete > Stage > Closed Won > Done

The Opportunity moves to **"Closed Won"** Stage

Closed Won Date is Captured as Admission Date on Opportunity and Stay

Status of the Stay = ACTIVE (Automatic)
Room Status = Occupied (Automatic)

Stay, Room & Life cycle Management

Discharge

(Stay > Stay Record)

Clone Opportunity

1. Find the Stay Record on Stay Tab (Stay > Active)
2. Click "Discharge" action button (Top Right, Below the Nav Bar)

Discharge Process

1. Actual Discharge Date
2. Financial Contract End Date
3. Discharge Reason
4. Click "Next"
5. Select "Room Status" and "Room Sub Status" (If Applicable)
6. Click "Next".

Discharge Outcome

(Stays > Discharge)

- After the Financial Contract End Date, Go to "Stays > Completed" and Select "**Mark as Current Status"**

The Stay Record moves to **"Completed"** Status

(Stays > Completed)

PHASE 02

- Room Transfers
- Respite Conversions
- Rate Changes