RESIDENT CONTRACTS
CARE COMPASS · QUICK REFERENCE

Kingsley HEALTHCARE

Care Compass writes the contract. You make it right.

LIVE WEDNESDAY 11 NOVEMBER 2026

For the care home team · keep it by your PC

The journey · SIX STEPS, YOU OWN THE FIRST FOUR

1. **Financial assessment** — Every funding type, bill payer / signee (address and e-mail) and weekly fee
2. **Book the room** — Room, planned admission date, planned discharge date (respite)
3. **Contract stage** — One contract per funding contribution — Pending, Draft
4. **Confirm** — Open each contract, review, confirm
5. **Signing** — Hub sends within 30 min. Manager signs first, then the bill payer
6. **Filed** — Signed contracts sit in Care Compass — nothing to file

The home — gets the detail right and confirms; the manager signs first

Care Compass and the Hub — generate, send, file

Every admission, every time · FROM WEDNESDAY 11 NOVEMBER

1. **Contracts are generated in Care Compass**
   Every opportunity moving into Contract stage and every new one — including opportunities already open.
2. **Add the resident to Coldharbour as well**
   When a resident is admitted. — Until further notice
3. **Send the admission e-mail to the head office revenue team, as usual**
   No need to attach the signed contracts — revenue can see them in Care Compass. — Until further notice
4. **Attach social services confirmation e-mails to the opportunity**
   So revenue can see them. If they are not there, revenue will chase you.
5. **Do room transfers and discharges in both Care Compass and Coldharbour** — Until further notice

Before you confirm — check every contract

What to review

- **Care seeker** — first and last name; mailing address
- **Bill payer** — first and last name; mailing address
- **Bill payer e-mail** — no e-mail, no contract
- Fee, room and dates match what was agreed
- **Split funding = two contracts.** Confirm both

Three shapes

- **Self-funded** — one funding type, one contract, one bill payer
- **Split funding** — private + third-party top-up: two contracts, each with its own bill payer
- **LA + CHC / LA + FNC** — the council pays; a **family member** signs the Kingsley terms and conditions
- Missing funding type = missing contract. Add it on the financial assessment

Do / don't

- ✓ Complete the financial assessment fully before you expect contracts
- ✓ Check the bill payer's e-mail on the contact record
- ✓ Confirm every record, not just the first
- ✓ Chase your bill payer if still pending after 7 days

- ✗ Confirm a record you have not read
- ✗ Send a family your own version, or anything from outside Care Compass
- ✗ Admit before every contract has been **sent**
- ✗ Ask the bill payer to sign before the manager — the system won't let them

Confirming is the handover. No need to ring anyone or send anything.

Kingsley HEALTHCARE

What if... and where is it now?

LIVE WEDNESDAY 11 NOVEMBER 2026

Signing, status, re-admissions and help

Where is my contract? · OPPORTUNITY › CONTRACT TAB — LOOK BEFORE YOU RING

WHERE IT IS	REVIEW	CURRENT SIGNEE	DOCUMENT	YOUR MOVE
Before you confirm	Pending	—	Draft	Waiting on you
Confirmed, before the Hub generates	Confirmed	—	Ready for Generation	With the Hub to send
With the manager	Confirmed	Manager	Generated	Sign it
With the bill payer	Confirmed	Bill payer / signee	Generated	Chase after 7 days
With revenue (direct debit)	Confirmed	Revenue Team	Generated	Nothing to do
Fully signed	Confirmed	—	Completed	Already filed

Signing

- The Hub actions every confirmed contract within **30 minutes**
- The **manager signs first** — click the contract name in the e-mail, review, sign
- One contract now includes the **T&Cs and the direct debit mandate**
- Then the bill payer: bank details in the e-mail; reminders after **3 and 7 days**

Signed? It's already filed

- Opportunity › **Notes & Tasks** › Files
- Contract › **Signed Documents** (PDF and signing log)
- After admission: all contracts sit on the **stay**
- No folders, no FileStream

What if...

No e-mail for the bill payer?

Before you confirm: pencil › tick **Needs In Person Signing** › Save › confirm. It goes to your **orange tablet mailbox** — take the signature in person.

Manager away?

Click **Change Signatory** (top right) **before** confirming: manager › deputy manager › operations manager.

Manager's post vacant?

Nothing to do — the system picks the deputy, or the operations manager.

Room occupied today, free by admission?

Book it. But the room must be **vacant** when you complete the admission.

Resident moves in before the bill payer signs?

You can complete the admission — as long as **every contract has been sent**.

Deposit or social services confirmation not in?

Answer **No** (blank stops you). Change to **Yes** when it arrives; attach the confirmation e-mail.

Re-admissions · START FROM THE STAY, NEVER A NEW LEAD

Discharge › Readmit › pick the reason

- **Respite Conversion** — respite resident staying on
- **Repeat Stay** — a past resident returning (no discharged stay? new enquiry)
- **Home Transfer** — change **Care At** to the new home **before** you save, then tell that home
- Readmit only appears on a **discharged** stay

Skip — or not?

- Returning resident: tick **Skip Showround** only
- Respite conversion: tick **Skip Showround** and **Skip Clinical Assessment**
- **Always:** financial assessment · book a room · contracts · admission

Call or e-mail us before confirming if...

Ring first when

- A bill payer has no e-mail and cannot sign in person at the home
- A bill payer cannot pay by direct debit
- Any other contract-related query

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Can't sign in? Kingsley IT, as usual.