Kingsley HEALTHCARE

CARE COMPASS · GO-LIVE TRAINING · STARTING SHORTLY

Care Compass writes the contract. You make it right.

Resident Contracts for the Care Home Team – live **Wednesday 11 November 2026**

Live demo
in Care Compass UAT – just watch

Questions
in the chat, any time

DocuSign questions?
IT Support is here too

BEFORE WE START

This session is being recorded.



This session is recorded

Video, audio and the chat — so colleagues who can't join today can watch it later.



Who sees it

Shared only with Kingsley colleagues who need it, with the quick reference sheet.



In the chat

Please don't write residents', families' or colleagues' names, or any care details.



Prefer not to be recorded?

Keep your camera and microphone off and ask your questions in the chat.

WELCOME

Your team today.

TRAINER

Nelka Silva

Live demo in the Care Compass UAT environment

MODERATOR

Darsh

Keeps time, takes questions to Nelka

CHAT AND COMMUNICATION

Aaron

Answers in the chat; posts links and the quick reference

DOCUSIGN QUESTIONS

IT Support

Questions about the existing DocuSign-based contract process — ask in the chat

NO NEED TO LOG ON TODAY

Just watch: Nelka shows every step live in the Care Compass UAT (test) environment. Ask your questions in the chat.

TODAY

Two parts, one journey.

PART 1 · CORE MODULE

From financial assessment to a signed contract

- What changes on 11 November
- Six steps: assessment, room, contract stage, confirm, signing, filed
- Every “What if…” the homes have asked
- Reading the status without ringing anyone

PART 2 · RE-ADMISSIONS

A resident we know, coming back

- Respite to permanent
- Repeat stay
- Home transfer
- What you can skip — and what you can't

THEN

Your questions

- Against the live UAT demo
- Your quick reference

WHAT IS CHANGING LIVE 11 NOV

From 11 November, the contract writes itself.

The home still owns the detail and the manager still signs. What changes is who does the typing.

	UNTIL NOW	FROM WEDNESDAY 11 NOVEMBER
Where it is made	~~Put together by hand~~	✓ In Care Compass, from what you already entered
What you do	~~Key it in, document by document~~	✓ Review it, then confirm
What the family gets	~~Contract, T&Cs and direct debit, chased separately~~	✓ One combined contract, signed electronically
Where it ends up	~~E-mail, folders and FileStream~~	✓ In Care Compass – nothing to file

WHAT YOU GET BACK

No re-keying the same details into a contract. One signature from the family covers everything.

WHAT IT ASKS OF YOU

Keying becomes **checking**. Everything you enter earlier lands on the contract word for word.

THE WHOLE JOURNEY

Six steps. You own the first four.

1
Financial assessment
Funding types, bill payers, the weekly fee

2
Book the room
Room, planned admission date, planned discharge date (respite)

3
Contract stage
One contract per funding contribution, as Draft

4
Confirm
Check every contract, then confirm

5
Signing
Manager first, then the bill payer

6
Filed
Signed contracts sit in Care Compass

The home – gets the detail right and confirms. The manager signs first.

Care Compass and the Hub – generate, send and file.

Kingsley HEALTHCARE

01

The core module

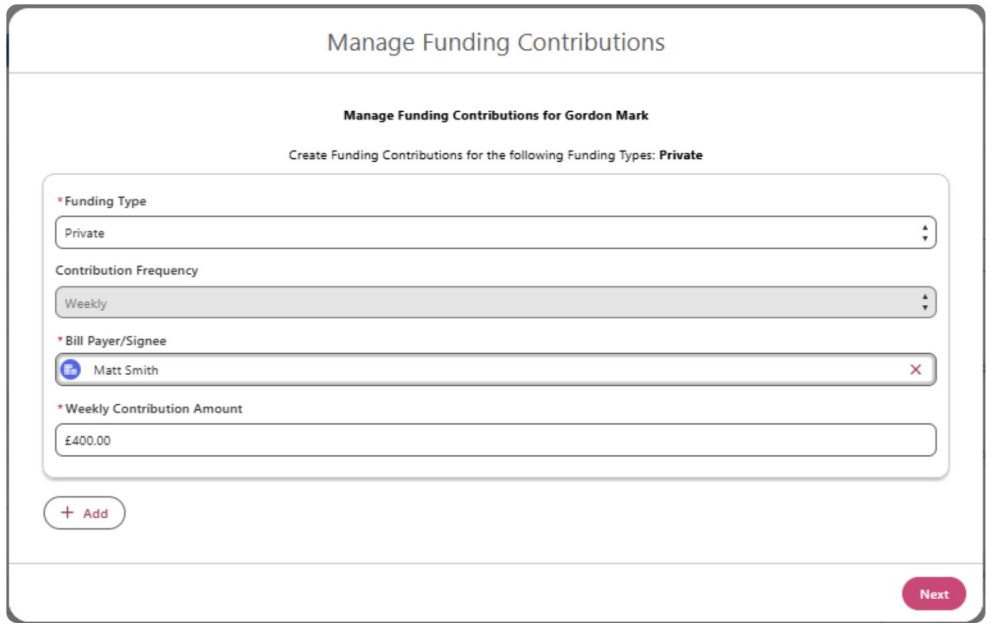
From the financial assessment to a signed, filed contract — every admission from 11 November.

STEP 1 · PRIVATE, THIRD PARTY OR CLIENT CONTRIBUTION

Get the financial assessment right.

Everything you enter here lands on the contract word for word.

MANAGE FUNDING CONTRIBUTIONS



1. Add the agreed and **finalised** funding types.
2. Select the **bill payer / signee** for each funding type.
3. Add the agreed **weekly fee**.

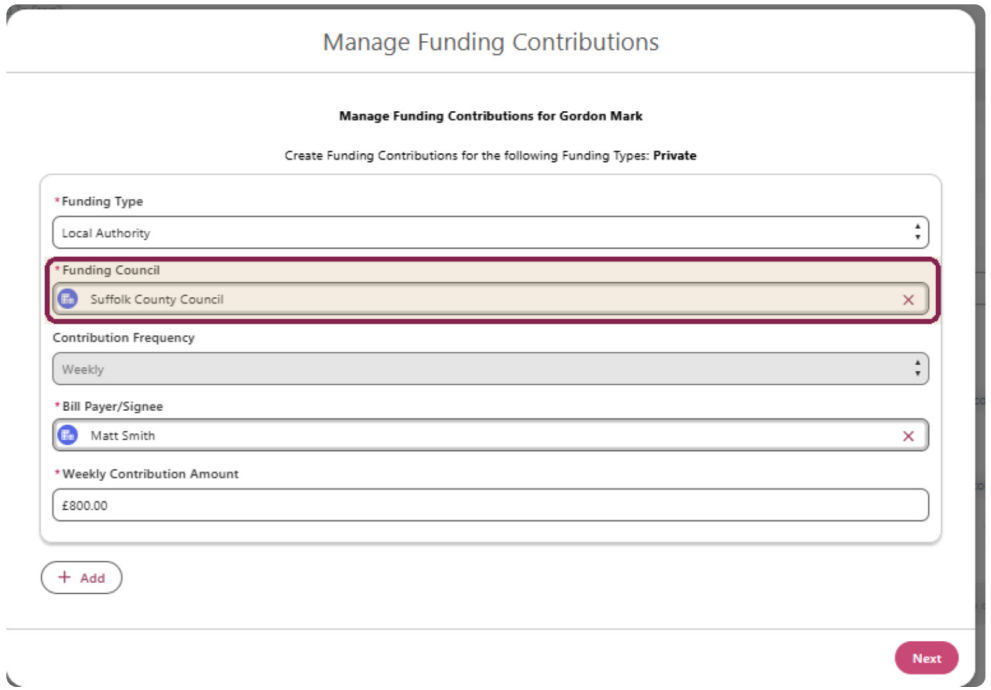
WHEN YOU CREATE A BILL PAYER / SIGNEE

Capture the **mailing address** and the **e-mail address**. The contract is e-mailed to that address – a missing or wrong e-mail means it never arrives.

STEP 1 · LOCAL AUTHORITY, CHC OR FNC

The council pays. A family member signs.

FUNDING COUNCIL APPEARS FOR LA, CHC AND FNC



1. Add the agreed and finalised funding types.
2. Select a **family member** as bill payer / signee — they sign the Kingsley terms and conditions.
3. Select the **funding council, CHC or FNC body**.
4. Add the agreed weekly fee.

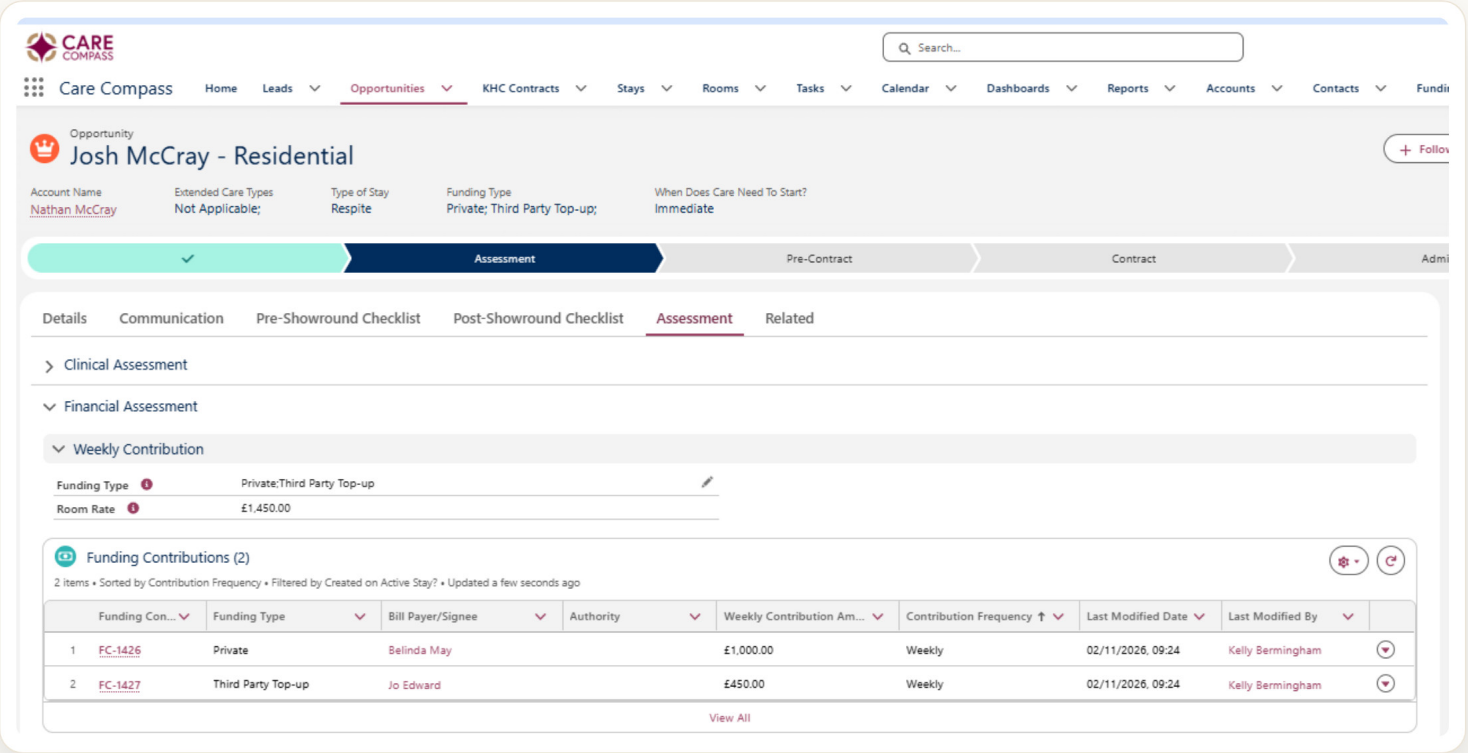
THE POINT MOST OFTEN MISSED

The council or health body is **never** the signee. The main funding agreement sits with them, outside Care Compass.

STEP 1 · WHAT YOU WILL SEE

One fee, split by who pays.

Opportunity › Assessment tab › Financial Assessment



READ IT ACROSS

The room rate is the whole weekly fee. The rows underneath are how it is split, and who pays each part.

TWO BILL PAYERS

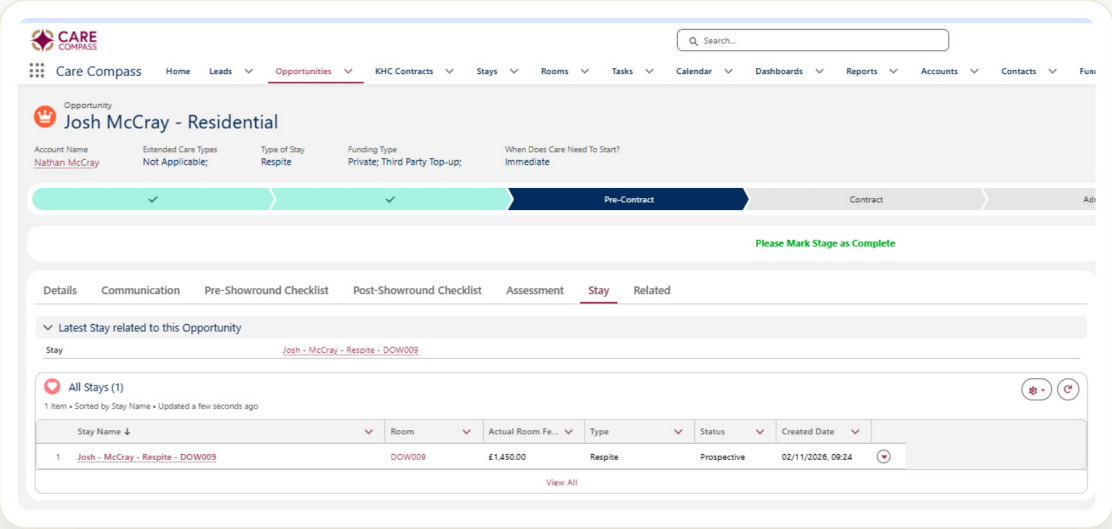
Two different people means two contracts follow. If anyone asks where the contracts come from — this screen.

STEP 2

Book the correct room.

Three things on the contract come straight from the booking. Book the wrong room and the contract carries the wrong room.

1. The **room number**
2. The **planned admission date**
3. The **planned discharge date** – respite only



? WHAT IF…

the room is occupied today, but I know it will be free for this admission?

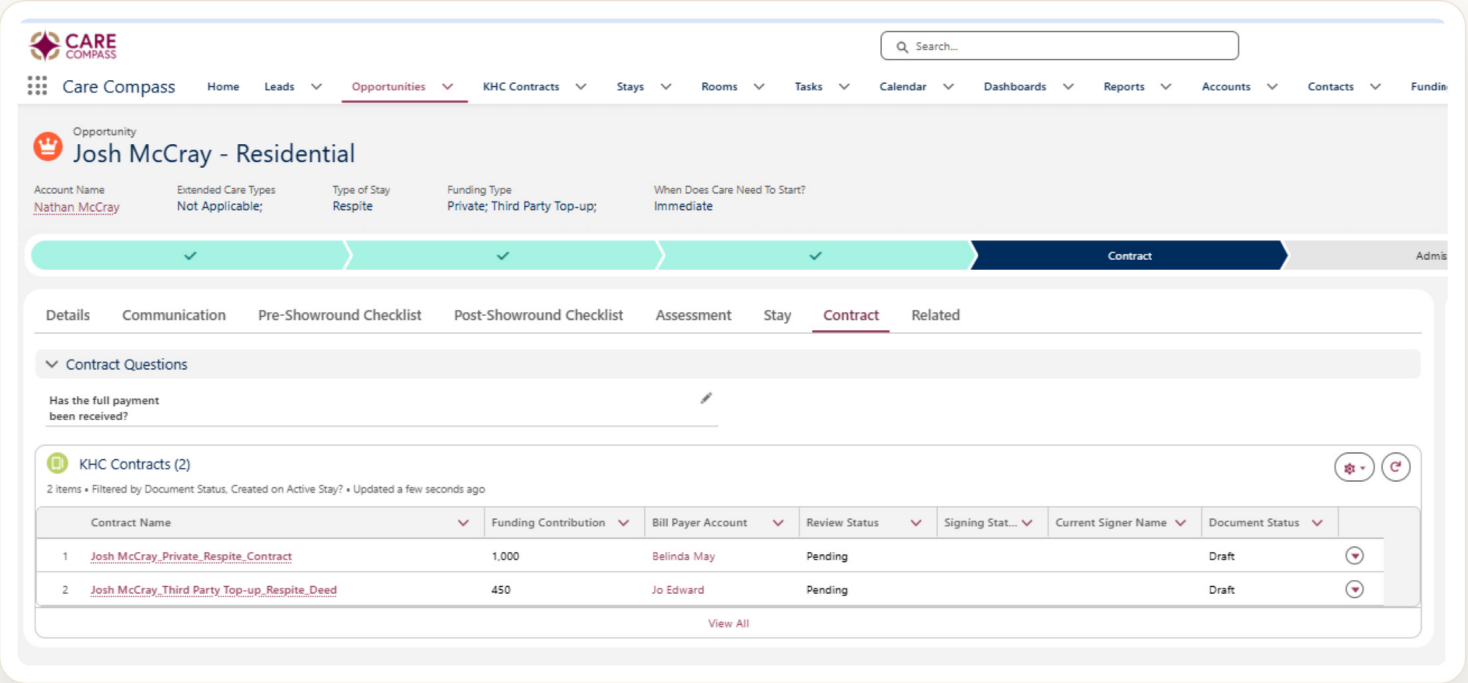
Book it. You can now book an occupied room for a future admission.

But check before you admit: the room must be vacant when you complete the actual admission.

STEP 3

Welcome to Contract stage.

Opportunity › Contract tab › KHC Contracts



What you will see

- One row for each funding contribution, each with its own bill payer
- Review status: **Pending**
- Document status: **Draft**

NOTHING HAS GONE ANYWHERE YET

Open each contract from here to review and confirm it. A row still at Pending is a contract nobody has reviewed.

STEP 3

What to expect — three shapes.

1

Self-funded

One funding type

- One contract
- One bill payer signs
- Most admissions look like this

2

Split funding

Private + third-party top-up

- Two funding types = **two contracts**
- Each with its own bill payer
- Review and confirm **both**

3

LA + CHC or LA + FNC

Council or health body funds

- One contract — the Kingsley terms and conditions
- It goes to the family
- The main funding agreement is not in Care Compass

IF A FUNDING TYPE IS MISSING

Its contract is never created — so somebody never gets billed. Add it on the financial assessment and the contract follows.

STEP 4

Confirm every contract.

One contract per funding contribution. Every contract carries three statuses: Review, Document and Signing.

1. Open **each** contract
2. Review the details
3. Confirm

THE ONE THAT MATTERS MOST

No e-mail address means the contract never reaches the bill payer — and nobody finds out until someone chases.

What to review

- **Care seeker** — first and last name correct; mailing address captured
- **Bill payer** — first and last name correct; mailing address captured
- **Bill payer e-mail** — captured and correct
- Fee, room and dates match what was agreed

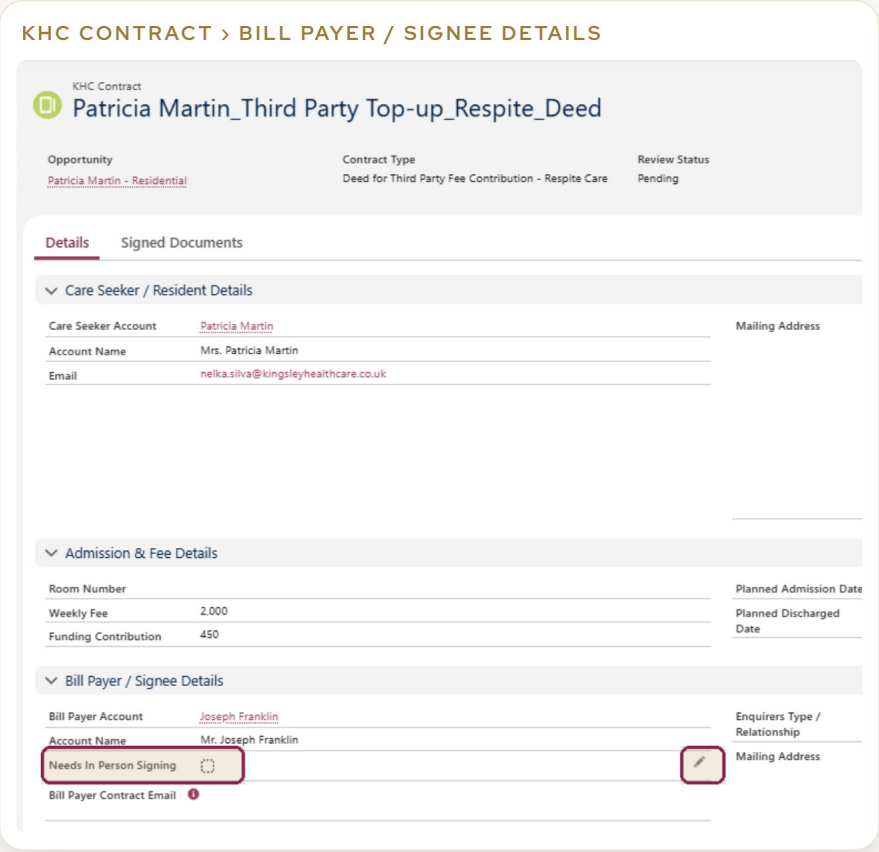
CONFIRMING IS THE HANDOVER

The moment you confirm, it goes to the family. Read it properly first.

BEFORE YOU CONFIRM

What if there is no e-mail?

KHC CONTRACT › BILL PAYER / SIGNEE DETAILS



? WHAT IF…

the bill payer does not have an e-mail address?

Before you confirm, tick **Needs In Person Signing**. The contract goes to your **orange tablet mailbox** instead – open it there and take the signature in person.

1. Click the **pencil** to edit the field
2. Tick **Needs In Person Signing**
3. **Save** – then confirm the contract

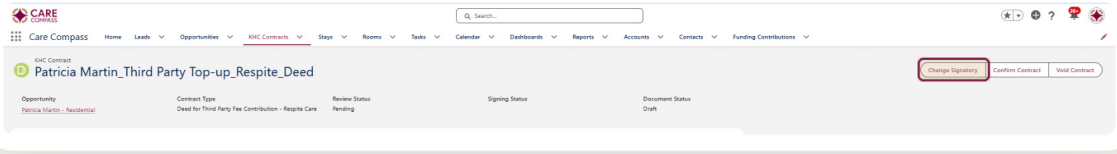
ORDER MATTERS

Tick and save first, confirm afterwards. Once generated, the contract has already chosen its route.

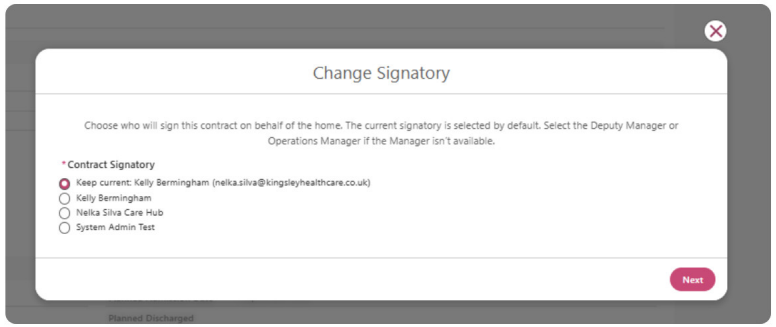
BEFORE YOU CONFIRM

What if the manager can't sign?

CHANGE SIGNATORY – TOP RIGHT OF THE CONTRACT



CHOOSE WHO SIGNS TODAY



? WHAT IF…

the manager is away?

Click **Change Signatory** (top right) **before** you confirm. It shows who is next in line:
1 Manager · **2** Deputy manager · **3** Operations manager.
Select who can sign today, then confirm.

? WHAT IF…

the manager's post is vacant?

Nothing to do. The system picks the deputy manager, or the operations manager if there is no deputy, until the post is filled.

WHAT HAPPENS NEXT

The moment you confirm.

YOU

Confirm

Status becomes

Ready for Generation

CARE ADVISORY HUB

A task is raised

Actioned within **30 minutes** by whichever advisor is free

AUTOMATICALLY

The documents go out

Generated and e-mailed for signature — the **manager first**

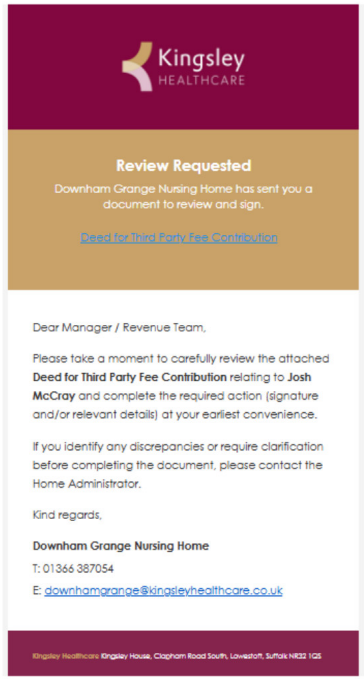
CONFIRMING IS THE HANDOVER

You don't need to ring anyone or send anything. Expect the family to hear from us the same day you confirm and the manager signs.

SIGNING · FIRST SIGNATURE

The home signs first.

WHAT THE MANAGER RECEIVES



Kingsley HEALTHCARE

Review Requested

Downham Grange Nursing Home has sent you a document to review and sign.

Deed for Third Party Fee Contribution

Dear Manager / Revenue Team,

Please take a moment to carefully review the attached **Deed for Third Party Fee Contribution** relating to **Josh McCray** and complete the required action (signature and/or relevant details) at your earliest convenience.

If you identify any discrepancies or require clarification before completing the document, please contact the Home Administrator.

Kind regards,

Downham Grange Nursing Home

T: 01366 387054

E: downhamgrange@kingsleyhealthcare.co.uk

Kingsley Healthcare Kingsley House, Clapham Road South, Lowestoft, Suffolk NR32 1QS

1. Click the **contract name** in the e-mail to open it
2. Review it, then **sign**

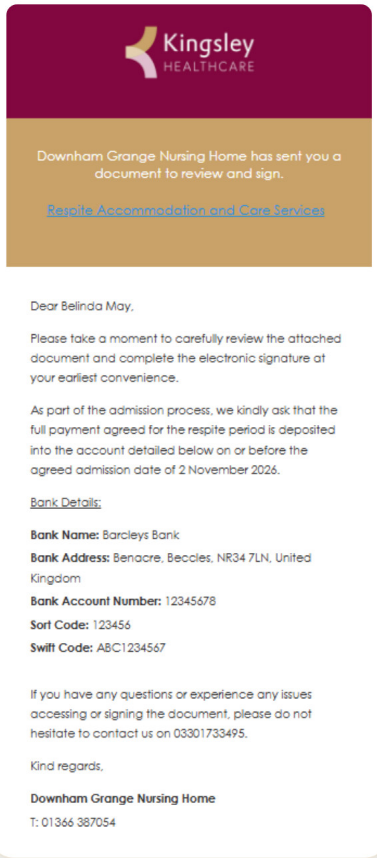
What's new here

- The contract, the **terms and conditions** and the **direct debit mandate** now arrive combined in **one** contract
- Direct debit mandate included on private, third party and client contribution contracts
- Nothing reaches the family until the home has signed

SIGNING · SECOND SIGNATURE

Then the bill payer.

WHAT THE BILL PAYER RECEIVES



Kingsley HEALTHCARE

Downham Grange Nursing Home has sent you a document to review and sign.

Respite Accommodation and Care Services

Dear Belinda May,

Please take a moment to carefully review the attached document and complete the electronic signature at your earliest convenience.

As part of the admission process, we kindly ask that the full payment agreed for the respite period is deposited into the account detailed below on or before the agreed admission date of 2 November 2026.

Bank Details:

Bank Name: Barcleys Bank
Bank Address: Benacre, Beccles, NR34 7LN, United Kingdom
Bank Account Number: 12345678
Sort Code: 123456
Swift Code: ABC1234567

If you have any questions or experience any issues accessing or signing the document, please do not hesitate to contact us on 03301733495.

Kind regards,

Downham Grange Nursing Home
T: 01366 387054

When it goes out

- Only once the home has signed — the bill payer cannot sign before that
- They sign electronically from the e-mail: no paper, nothing to return
- The e-mail carries the **bank details** and asks for the full agreed (or advance) payment on or before the admission date

AUTOMATIC REMINDERS

After **3 days** and **7 days** from sending.

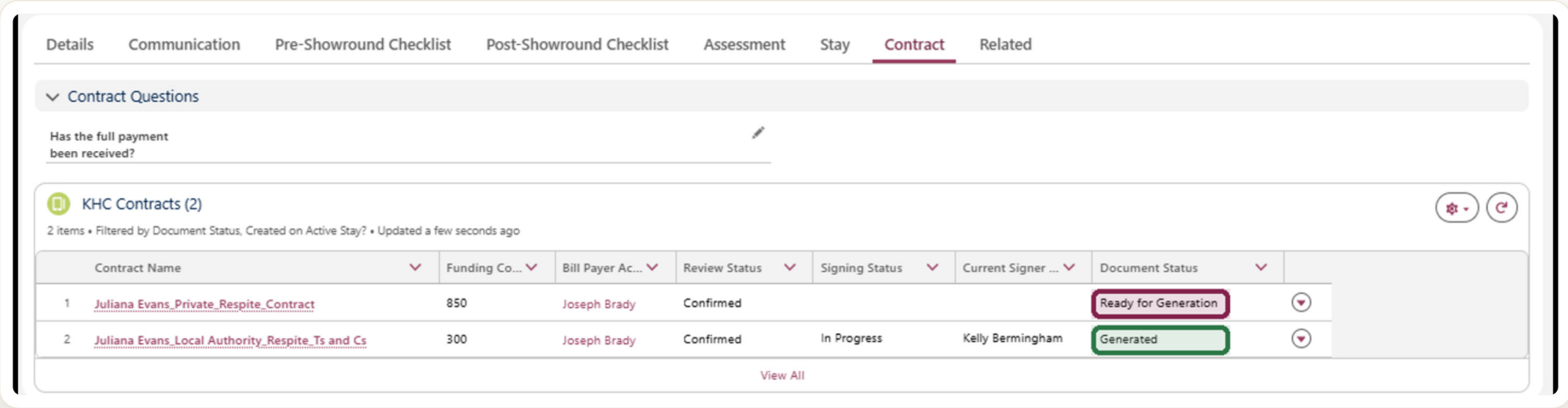
YOUR PART

Chasing the bill payer is the **home's** job. Still pending after 7 days? You make the call — you have the relationship.

SIGNING

You can always see where a contract is.

Opportunity › Contract tab. Every contract is listed with its own progress — no need to ring anyone.



Ready for Generation

You have confirmed it. It is with the Care Advisory Hub to send out.

Generated · In Progress

It has gone out and is being signed.

Current Signer

Names the person it is sitting with right now — that is who to chase.

WITHOUT RINGING ANYONE

How to read your contract status.

WHERE THE CONTRACT IS	REVIEW	SIGNING	CURRENT SIGNEE	DOCUMENT
Before you confirm	Pending	–	–	Draft
Confirmed, before the Hub generates	Confirmed	–	–	Ready for Generation
Generated, with the manager	Confirmed	In Progress	Manager's name	Generated
Manager signed, with the bill payer	Confirmed	In Progress	Bill payer / signee	Generated
Bill payer signed, with revenue (if direct debit)	Confirmed	In Progress	Revenue Team	Generated
Fully signed – nothing outstanding	Confirmed	Completed	–	Completed

STILL DRAFT
It is waiting on **you**. Nobody else can move it.

READY FOR GENERATION
With the Care Advisory Hub to send.

IN PROGRESS
Current Signee names who to chase.

COMPLETING THE ADMISSION

Don’t let paperwork hold up a move-in.

? WHAT IF…

the contracts are out, the bill payer hasn’t signed, and the resident moves in today?

You **can** complete the admission in Care Compass while contracts are pending signature.

? WHAT IF…

the deposit, or the confirmation from social services, hasn’t arrived?

Answer **No** to the relevant question. Leaving it blank stops you moving forward.

THE ONE CONDITION

Every contract must have been sent before you can move to the next stage. Check the list before the resident arrives.

THEN COME BACK TO IT

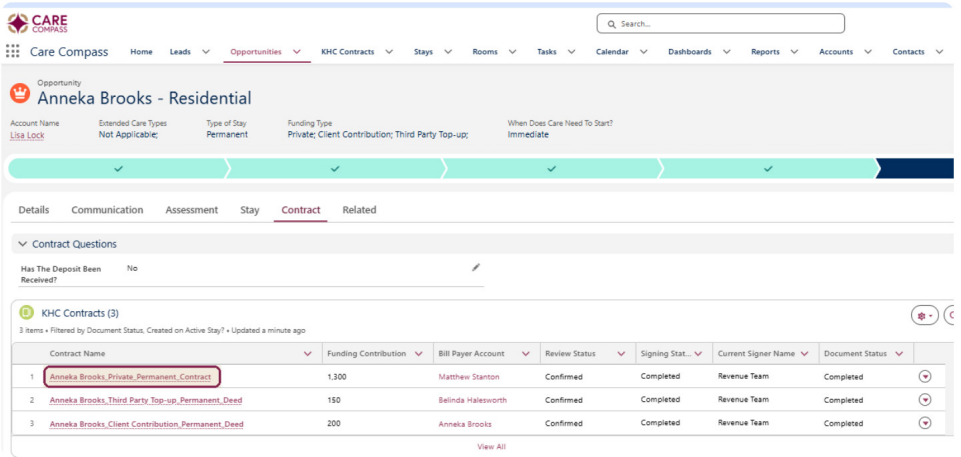
Change it to **Yes** as soon as the payment or the confirmation arrives. Attach social services confirmation e-mails to the opportunity so revenue can see them.

AFTER SIGNING · STEP 6

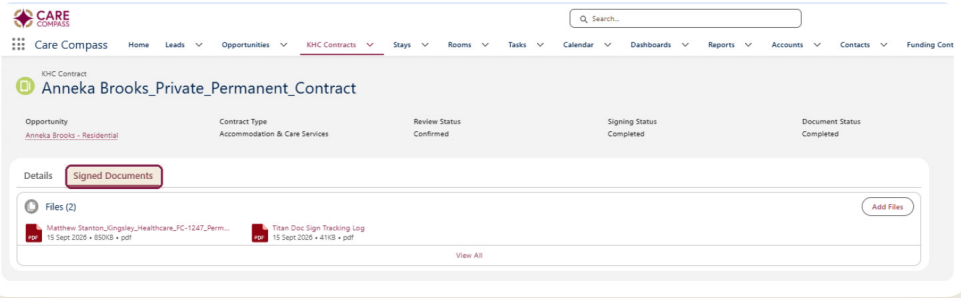
Where's the signed contract? Already filed.

Once fully signed, it is attached for you — no folders, no FileStream, nothing to save.

OPPORTUNITY › CONTRACT TAB — ALL COMPLETED



CONTRACT › SIGNED DOCUMENTS



1. Opportunity › **Notes & Tasks** tab › **Files**
2. Open a contract › **Signed Documents** (the PDF and the signing log)
3. Once the admission is complete, all contracts sit on the **stay**

REVENUE CAN SEE THEM TOO

No need to attach signed contracts to the admission e-mail.

GETTING IT RIGHT

Do this, not that.

✓ Do

- Complete the financial assessment fully, with every funding contribution, before you expect contracts
- Check the bill payer's e-mail address on the contact record
- Confirm **every** record, not just the first
- Chase your bill payer after 7 days

× Don't

- Confirm a record you have not read, to get it off the list
- Send a family your own version, or anything from outside Care Compass
- Admit a resident before the contracts are sent for signature
- Ask the bill payer to sign before the manager — the system won't let them

FROM WEDNESDAY 11 NOVEMBER LIVE 11 NOV

Every admission, every time.

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 — but no need to attach the signed contracts.
   Until further notice

4. **Attach social services confirmation e-mails to the opportunity**
   So revenue can see them. If they are missing, revenue will chase you.

5. **Do room transfers and discharges in both systems**
   Care Compass and Coldharbour.
   Until further notice

TO TAKE AWAY

Five things to remember.

1. The financial assessment **builds** the contracts. Get it complete and the rest follows.
2. Confirming means it goes to the family. **Read it properly first.**
3. The **manager signs first**. The bill payer is yours to chase.
4. Contracts **sent before the admission**. Every time.
5. Every signed contract is **already in Care Compass**.

02

Re-admissions

A resident Care Compass already knows — start from their stay, never from a new lead.

AFTER THE ADMISSION

Once the stay is active, everything happens on it.

The opportunity closes as won at admission and the stay takes over.

1

Room transfer

The resident moves room. You already do this on the stay.

2

Discharge

The stay ends. You already do this on the stay too.

3

NEW

Re-admit

Respite staying on, a past resident returning, or a move to another Kingsley home — from the discharged stay.

NEVER START A NEW LEAD FOR SOMEONE WE HAVE HAD BEFORE

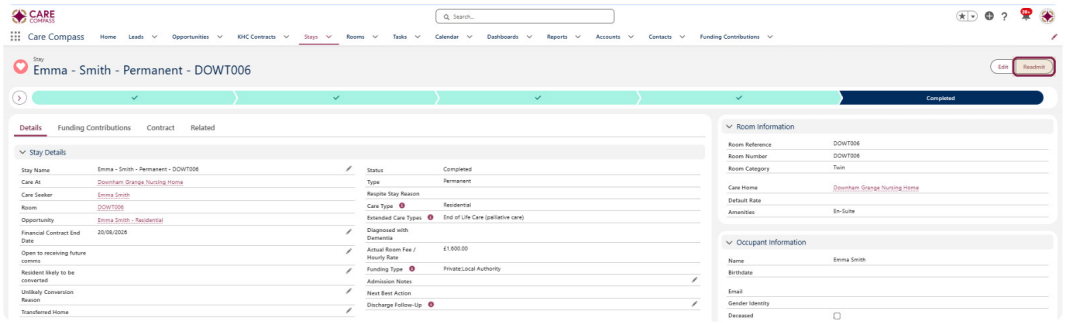
Re-admit **clones** the previous opportunity — history, contacts and everything we know stay joined up. A fresh lead breaks that, and you re-key what Care Compass already holds.

RE-ADMISSION

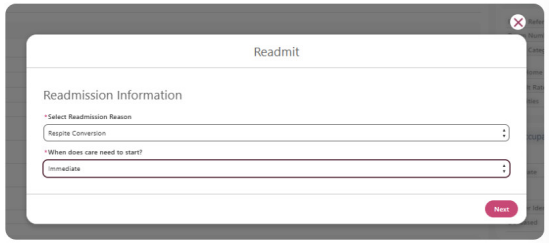
Respite to permanent.

An in-home resident staying on

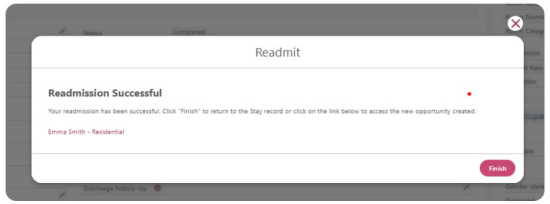
READMIT — TOP RIGHT OF THE DISCHARGED STAY



REASON



DONE — LINK TO THE NEW OPPORTUNITY



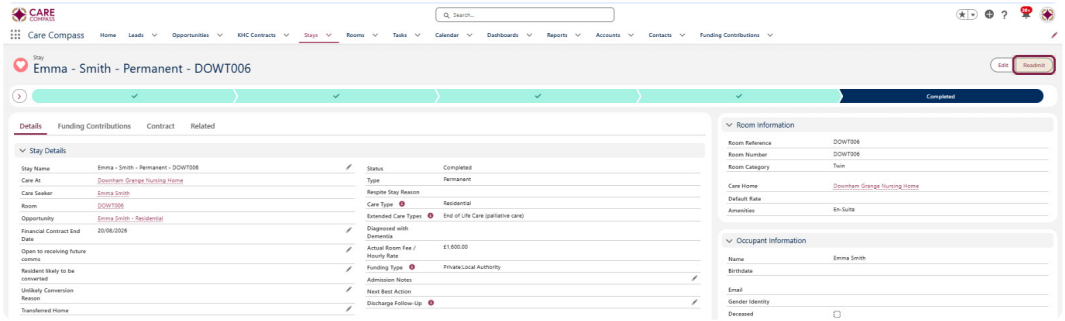
1. **Discharge** the current respite stay, as usual
2. Click **Readmit** on the discharged stay
3. Reason **Respite Conversion**; change any details; save
4. A new opportunity is created — complete it as usual

RE-ADMISSION

Repeat stay.

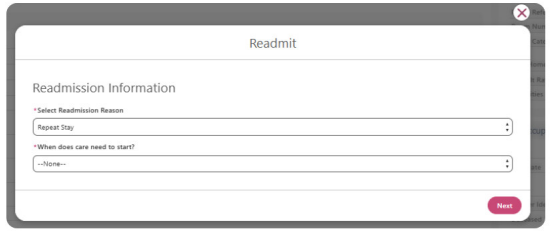
A past resident coming back

READMIT — TOP RIGHT OF THE DISCHARGED STAY



1. Find their **discharged stay**
2. Click **Readmit**
3. Reason **Repeat Stay**; change any details; save
4. A new opportunity is created — complete it as usual

REASON: REPEAT STAY



NO DISCHARGED STAY?

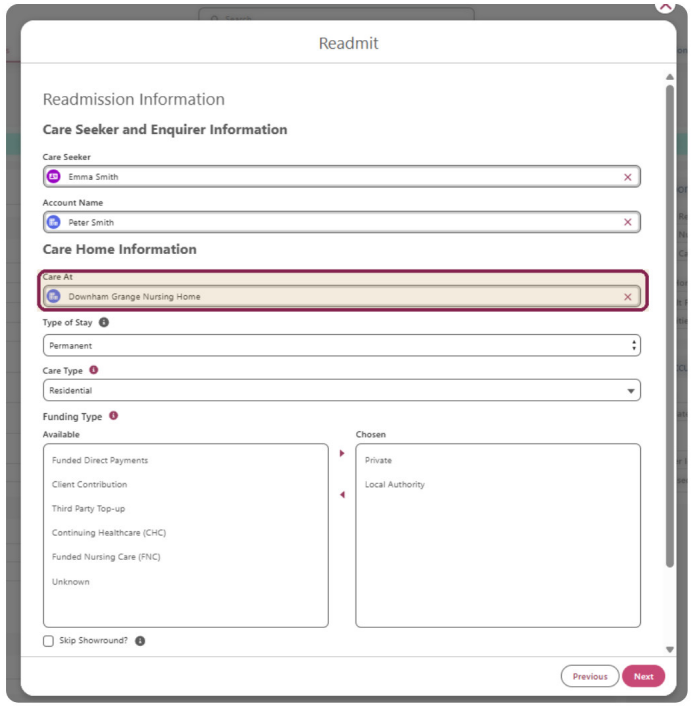
Then they are a new enquiry — the normal route.

RE-ADMISSION

Home transfer.

Moving to another Kingsley home

CARE AT – CHANGE IT TO THE NEW HOME



1. **Discharge** the stay at the current home
2. Click **Readmit** on the discharged stay
3. Reason **Home Transfer**
4. Change **Care At** to the new home **before** you save
5. A new opportunity is created, carrying the previous information

THE PREVIOUS HOME

Discharges, re-admits, selects the new home – then **tells the new home**.

THE NEW HOME

Completes the opportunity and gets **new contracts** – the home has changed.

RE-ADMISSION

What can you skip?

WHAT IF…

I want to skip the showround, but do the clinical assessment again?

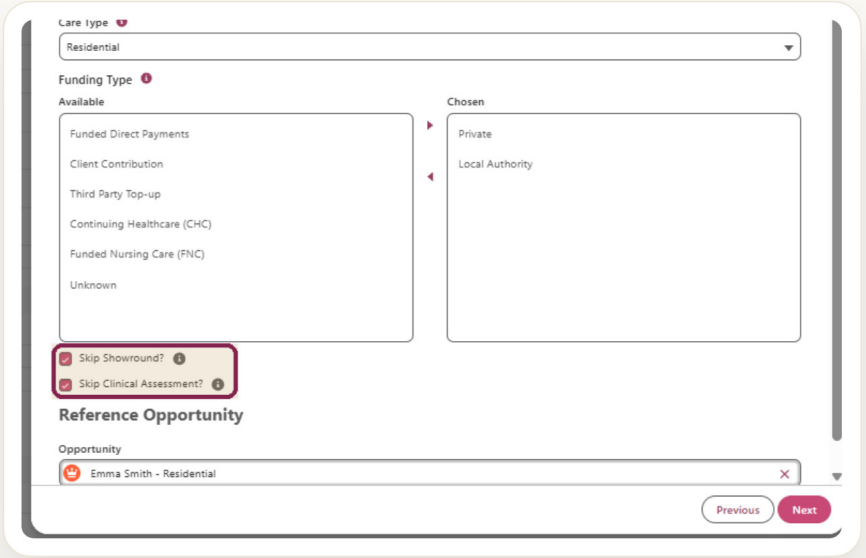
A **returning resident** – their needs may have changed.
Tick **Skip Showround** only.



WHAT IF…

I want to skip both – the resident is already in the home?

A **respite conversion** – you know them.
Tick **Skip Showround** and **Skip Clinical Assessment**.



RE-ADMISSION

Always — whatever you skipped.

1

Financial assessment

A new stay means new funding.

2

Book a room

The new contract quotes the room — even if they are already in it.

3

Contracts

New funding means new contracts.

4

Admission

A new stay needs its own admission date.

THE MONEY IS AGREED AFRESH

So the paperwork is too. Skipping the showround or the clinical assessment is allowed; skipping any of these four is not.

TO TAKE AWAY

Five things to remember.

1. A resident we have had before is re-admitted **from their stay** — never a new lead.
2. Readmit only appears on a **discharged** stay. Discharge first.
3. Pick the right reason: **respite conversion, repeat stay or home transfer**.
4. Home transfer: change **Care At** before you save — and tell the new home.
5. Every re-admission still needs an **assessment, a room, contracts and an admission**.

BEFORE YOU CONFIRM

Call or e-mail us first if...

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

CONTRACTS AND CARE COMPASS

Nelka

Ext. 2731

CONTRACTS AND CARE COMPASS

Aaron

Ext. 1951

CAN'T SIGN IN?

Kingsley IT, as usual.



Your questions

Against the live UAT demo. Aaron reads out the chat; Darsh keeps time. DocuSign questions: IT Support.

WHAT HAPPENS NEXT

Ready for Wednesday.

WED 11 NOV

Live

Every opportunity moving into Contract stage — including ones already open

TODAY

Quick reference

Aaron posts the one-page sheet in the chat. Keep it by your PC

THIS WEEK

Practise

Open one live opportunity and check its financial assessment and bill payer e-mails

ANY TIME

Recording

Shared after the session for anyone who missed it

Care Compass writes the contract. You make it right.