Kingsley HEALTHCARE

CARE COMPASS · GO-LIVE TRAINING CHAPTER 2

Resident Contracts

Made, signed and kept in Care Compass.

For the Finance Team · Head Office and Canthus

November 2026 · live from Wednesday 11 November

TODAY

Three parts, about 30 minutes.

1 · The change

- What Care Compass is, and six words to know
- What is new in Resident Contracts
- The new process, end to end

2 · Your view

- Finding admissions for your homes
- The stay record: details, funding, contracts
- Reading contract status; the templates

3 · Go-live rules

- What stays in FileStream and DocuSign
- What we have advised homes
- Five things to remember

THE SYSTEM

Care Compass: the resident's journey.

WHAT IS CARE COMPASS?

The system where a resident's journey is captured, from the **initial enquiry** all the way to **admission**.

Before the resident moves in

Enquiry, showround, assessments, contracts and the admission itself: all recorded here.

Once they are with us

In-stay **room transfers** and **permanent discharges** are recorded in Care Compass too.

THE LANGUAGE

Six words to get familiar with.

Lead

The initial enquiry the **Care Advisory Hub** receives in Care Compass.

Opportunity

Where the showround, clinical assessment, financial assessment, contracts and admission are all recorded.

Stay

A resident's active stay. **Active** on admission, **completed** on discharge. Think of it as an active resident in Coldharbour.

Funding type

Private · Third Party Top-up · Client Contribution · Local Authority · Continuing Healthcare · FNC. Each one counts on its own.

Funding contribution

Who is paying what: the **funding type**, the **payer** and the **amount**.

Account

A profile for a person or an organisation. Residents and family members are **individual** accounts; a council, ICB or CHC authority is a **business** account.

WHAT IS CHANGING LIVE 11 NOV

Keying becomes checking.

UNTIL NOW

Put together by hand

WHERE IT IS MADE

In DocuSign

WHAT YOU DO

Manual keying

WHERE IT ENDS UP

Shared by e-mail, then folders and FileStream

FROM 11 NOVEMBER

Built by Care Compass

WHERE IT IS MADE

In Care Compass

WHAT YOU DO

Check contracts and add financial accounts

WHERE IT ENDS UP

Stays in Care Compass: no e-mails, folders or FileStream

END TO END

The new process, and your part in it.

CARE HOME AND CARE ADVISORY HUB

1. The home **reviews and confirms** the contract details.
2. The Hub gets a task to **send** the confirmed contracts. Sending is all they do.
3. The home **chases the signatures**.
4. The home **completes the admission** in Care Compass: once signed, or sometimes while a family signature is still pending.
5. The home adds the resident to **Coldharbour** as usual.

HOME TO REVENUE TEAM

The home e-mails you about the admission, **as usual**.

But you can already **see the admission coming** in Care Compass.

REVENUE TEAM · YOUR PART

1. Check the details in Care Compass, **contracts included**.
2. Add the **financial accounts** to Coldharbour, working from Care Compass.
3. Set up the **direct debit** from the contracts.

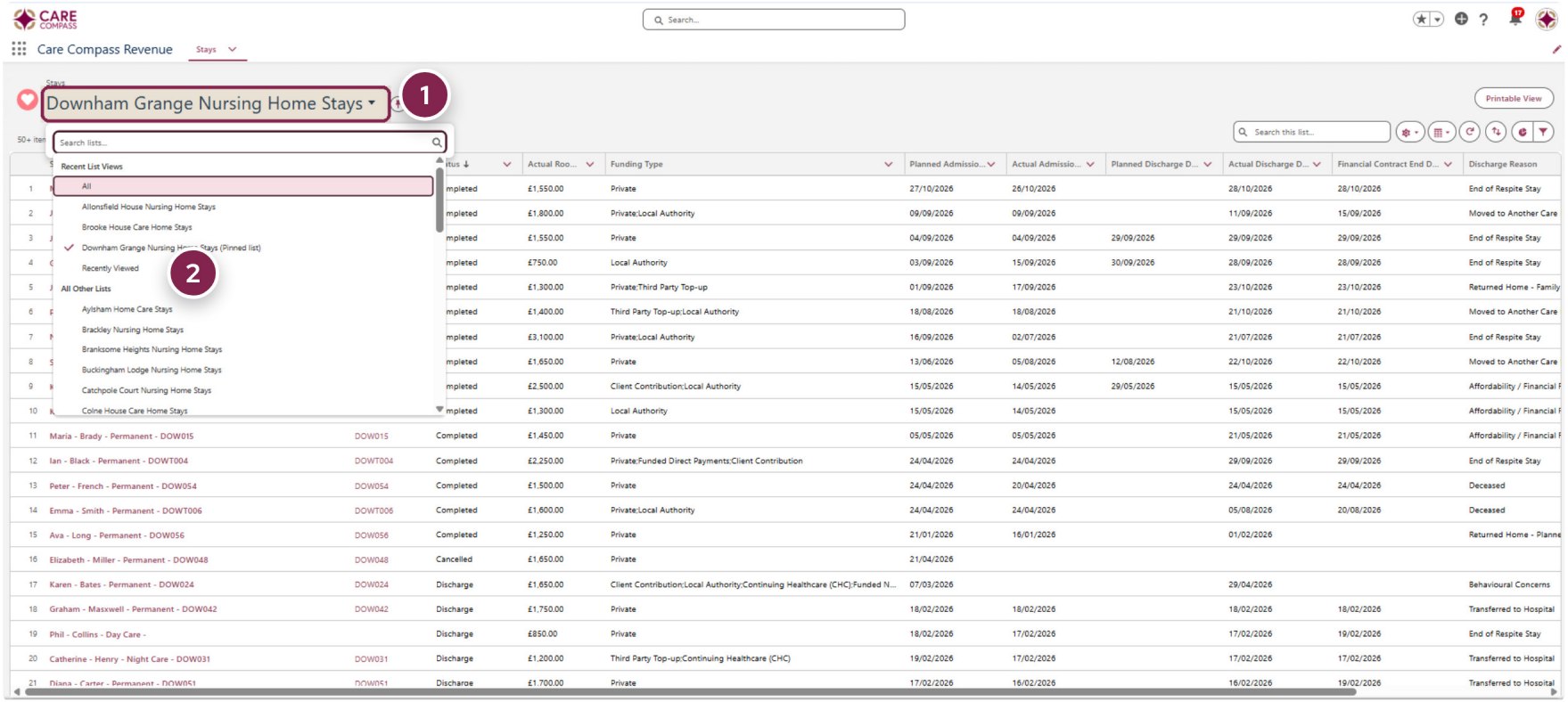
YOUR VIEW

How to find admissions in Care Compass.

Care Compass Revenue › Stays

SAMPLE RECORDS

THE STAYS LIST FOR ONE HOME



				Status	Actual Room Fee	Funding Type	Planned Admission	Actual Admission	Planned Discharge	Actual Discharge	Financial Contract End	Discharge Reason
11	Maria - Brady - Permanent - DOW015	DOW015		Completed	£1,450.00	Private	05/05/2026	05/05/2026		21/05/2026	21/05/2026	Affordability / Financial
12	Ian - Black - Permanent - DOWT004	DOWT004		Completed	£2,250.00	Private;Funded Direct Payments;Client Contribution	24/04/2026	24/04/2026		29/09/2026	29/09/2026	End of Respite Stay
13	Peter - French - Permanent - DOW054	DOW054		Completed	£1,500.00	Private	24/04/2026	20/04/2026		24/04/2026	24/04/2026	Deceased
14	Emma - Smith - Permanent - DOWT006	DOWT006		Completed	£1,600.00	Private;Local Authority	24/04/2026	24/04/2026		05/08/2026	20/08/2026	Deceased
15	Ava - Long - Permanent - DOW056	DOW056		Completed	£1,250.00	Private	21/01/2026	16/01/2026		01/02/2026		Returned Home - Planne
16	Elizabeth - Miller - Permanent - DOW048	DOW048		Cancelled	£1,650.00	Private	21/04/2026					
17	Karen - Bates - Permanent - DOW024	DOW024		Discharge	£1,650.00	Client Contribution;Local Authority;Continuing Healthcare (CHC);Funded N...	07/03/2026			29/04/2026		Behavioural Concerns
18	Graham - Maxwell - Permanent - DOW042	DOW042		Discharge	£1,750.00	Private	18/02/2026	18/02/2026		18/02/2026	18/02/2026	Transferred to Hospital
19	Phil - Collins - Day Care -			Discharge	£850.00	Private	18/02/2026	17/02/2026		17/02/2026	19/02/2026	End of Respite Stay
20	Catherine - Henry - Night Care - DOW031	DOW031		Discharge	£1,200.00	Third Party Top-up;Continuing Healthcare (CHC)	19/02/2026	17/02/2026		17/02/2026	17/02/2026	Transferred to Hospital
21	Diana - Carter - Permanent - DOW051	DOW051		Discharge	£1,700.00	Private	17/02/2026	16/02/2026		16/02/2026	19/02/2026	Transferred to Hospital

WHERE YOU LAND

You land on the **Stays** list for one home.

1. Click the **care home name** at the top to open the list of care homes
2. Select **one of your homes**

IN ONE VIEW

Status, actual room fee, funding type and the admission and discharge dates, without opening a record.

YOUR VIEW

What you can see when you open a home.

The columns

- Stay Name = resident name
- Status
- Funding Type
- Actual Admission Date
- Actual Discharge Date
- Discharge Reason
- Room Number
- **Actual Room Fee**
- Planned Admission Date
- Planned Discharge Date
- Financial Contract End Date

What the status means

Prospective	Room booked, resident not admitted yet
Active	Resident is in the home
Discharge	Discharged, but the financial contract ends on a future date
Complete	Discharged and the financial contract has ended

TIP

Click the **Status** column heading to re-order the residents by status.

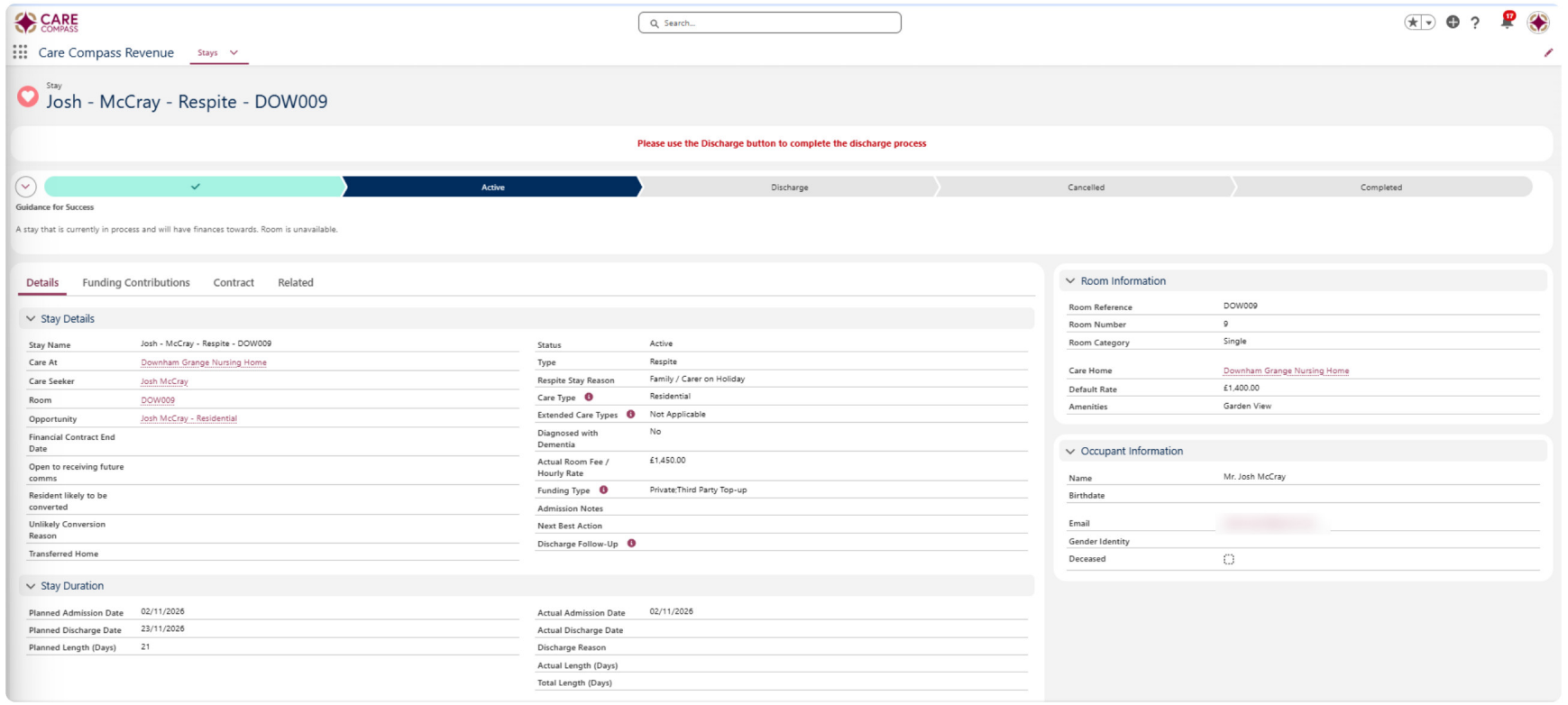
THE STAY RECORD

When you open an active stay.

Stay › Details tab

SAMPLE RECORDS

DETAILS TAB



The basic information about the resident

- Type of stay
- Funding type
- Room fee
- Planned and actual admission dates
- Planned and actual discharge dates

ACROSS THE TOP

The path shows the stay's status. The tabs are **Details**, **Funding Contributions** and **Contract**.

THE STAY RECORD

Funding Contributions: what you key into Coldharbour.

Stay › Funding Contributions tab

SAMPLE RECORDS

SPLIT FUNDING: TWO PAYERS, TWO LINES

Stay
Josh - McCray - Respite - DOW009

Details | Funding Contributions | Contract | Related

Funding Contributions (2)

2 items • Sorted by Active • Updated 5 minutes ago

	Funding Contri...	Funding Type	Bill Payer/S...	Authority	Weekly Contribut...	Active	Effective From Date	Effective To...	Last Modified Date	Last Modified By
1	FC-1426	Private	Belinda May		£1,000.00	✓	02/11/2026		02/11/2026, 16:17	
2	FC-1427	Third Party Top-up	Jo Edward		£450.00	✓	02/11/2026		02/11/2026, 16:17	

View All

SAMPLE RECORDS

LOCAL AUTHORITY: THE AUTHORITY IS NAMED

Stay
Karen - Bates - Permanent - DOW013

Details | Funding Contributions | Contract | Related

Funding Contributions (1)

1 item • Sorted by Active • Updated a few seconds ago

	Funding Co...	Funding Type	Bill Payer/Signee	Authority	Weekly Contri...	Active	Effective From Date	Effective To...	Last Modified D...	Last Modified By
1	FC-1470	Local Authority	Matt Smith	Bedford Borough Council	£1,400.00	✓	02/11/2026		02/11/2026, 17:10	

View All

USE THIS TAB

when you add the resident's **financial accounts** in Coldharbour.

For each funding type

- What the **amount** is
- **Who is paying** it
- The **authority**, where it is LA, CHC or FNC

ONE LINE, ONE ACCOUNT

Two funding lines on the stay become two accounts in Coldharbour.

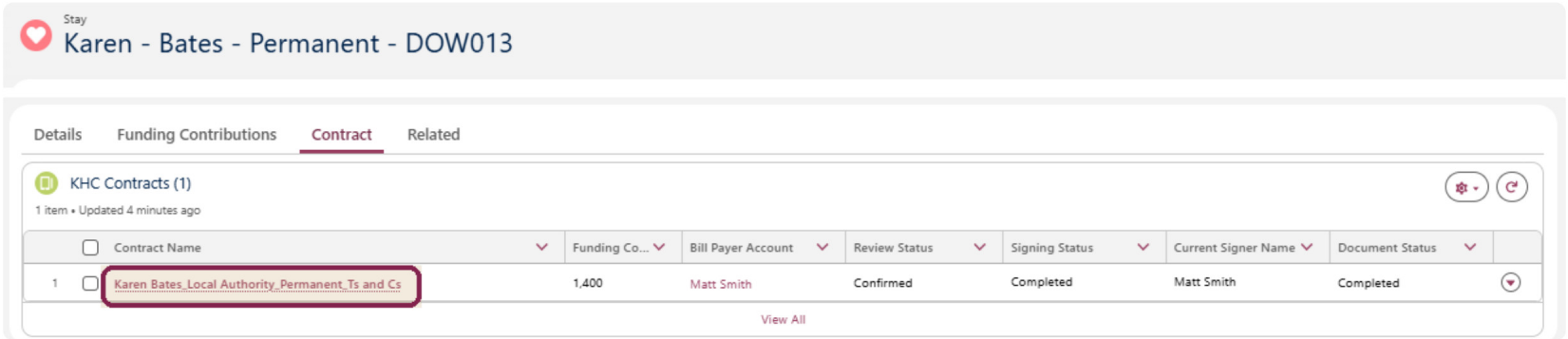
THE STAY RECORD

The Contract tab: every contract, every status.

Stay › Contract tab

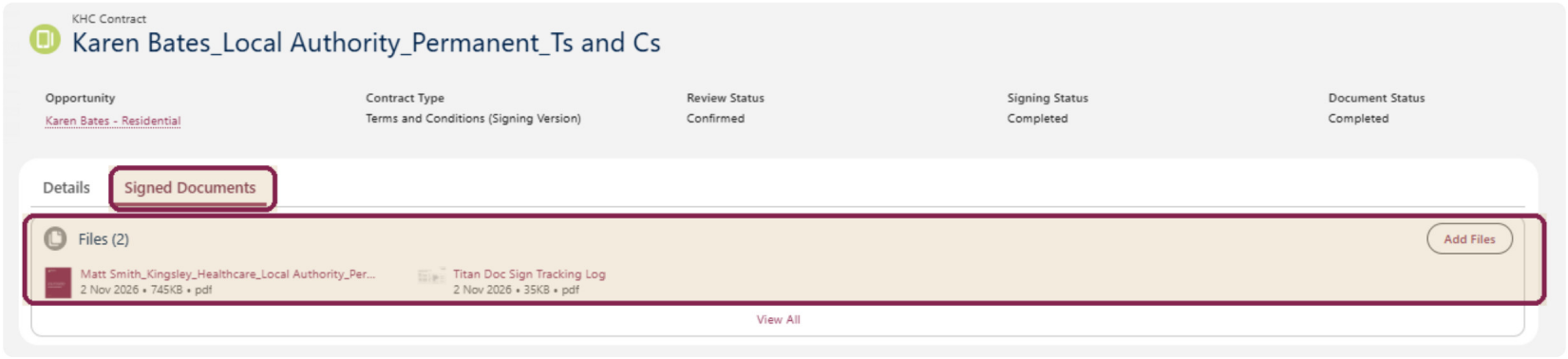
SAMPLE RECORDS

ON THE STAY: CLICK THE CONTRACT NAME



SAMPLE RECORDS

ON THE CONTRACT: SIGNED DOCUMENTS



1. See **all contracts** and their statuses
2. Open one by clicking the **red hyperlink**
3. Go to **Signed Documents** to view the signed contract as a PDF

QUICKEST CHECK

The list shows review, signing and document status for every contract raised for the stay.

THE CONTRACT TAB

How to read contract status.

REVIEW STATUS

Confirmed: the home has reviewed the details and confirmed them before the contracts were sent out.

THE FIELD	WHILE SIGNING IS IN PROGRESS	WHEN SIGNING IS COMPLETE
Signing Status	In Progress The contract is out with one of the signees	Completed Everyone has signed
Current Signer Name	**Who is holding it now** The home manager, the bill payer or the Revenue Team: whoever it is waiting on	**No one is waiting** The name left showing is the last person who signed
Document Status	Generated The document exists but is not signed off yet	Completed Everyone has signed and the signed PDF is on the Signed Documents tab

IN ONE LINE

Signing Status Completed and Document Status Completed: that contract is fully signed.

THE DOCUMENTS

One template per funding type.

Type of stay = Permanent

Private	Contract for accommodation and care services
Third Party Top-up	Deed for third party fee contribution
Client Contribution	Deed for client contribution
LA / CHC / FNC	Terms and Conditions **Only one is generated, even if two or all three apply to the same resident**

Type of stay = Respite

Private	Contract for **respite** accommodation and care services
Third Party Top-up	Deed for third party fee contribution
Client Contribution	Deed for client contribution
LA / CHC / FNC	Terms and Conditions **Only one is generated, even if two or all three apply to the same resident**

STAY = DAY CARE

Contract for Day Care accommodation and care services

STAY = NIGHT CARE

Contract for Night Care accommodation and care services

GO-LIVE

Three rules to bear in mind.

STAYS IN FILESTREAM

Existing resident contracts

Nothing is migrated to Care Compass.

Contracts signed before go-live stay in FileStream. That is still where you go to find them.

SITS IN CARE COMPASS

New admissions from 11 November

Any admission completed in Care Compass keeps its contract **in Care Compass**.

No need to add it to FileStream.

STAYS IN DOCUSIGN

Bank detail changes during a stay

If a bill payer changes their bank details, keep sending the **DD mandate from DocuSign**.

This stays as it is until further notice.

GO-LIVE · WHAT WE HAVE ADVISED HOMES

Contract signing: e-mail first.

1. **Always send contracts by e-mail**
2. No e-mail? Encourage **in-person signing** when they visit the home
3. No e-mail and no in-person signing? **Contact the Care Compass team**

FOR THE BILL PAYER

The system also sends a reminder automatically after **3 days** and again after **7 days**. Chasing the signature stays with the home.

GO-LIVE · WHAT WE HAVE ADVISED HOMES

Returning residents arrive as new admissions.

All three reach you as a new admission. The **Readmission Reason** tells you which one it was.

Repeat resident

The home admits in Care Compass and generates new contracts.

Repeat Stay

Respite to permanent

The home discharges the respite stay, admits again and generates new contracts.

Respite Conversion

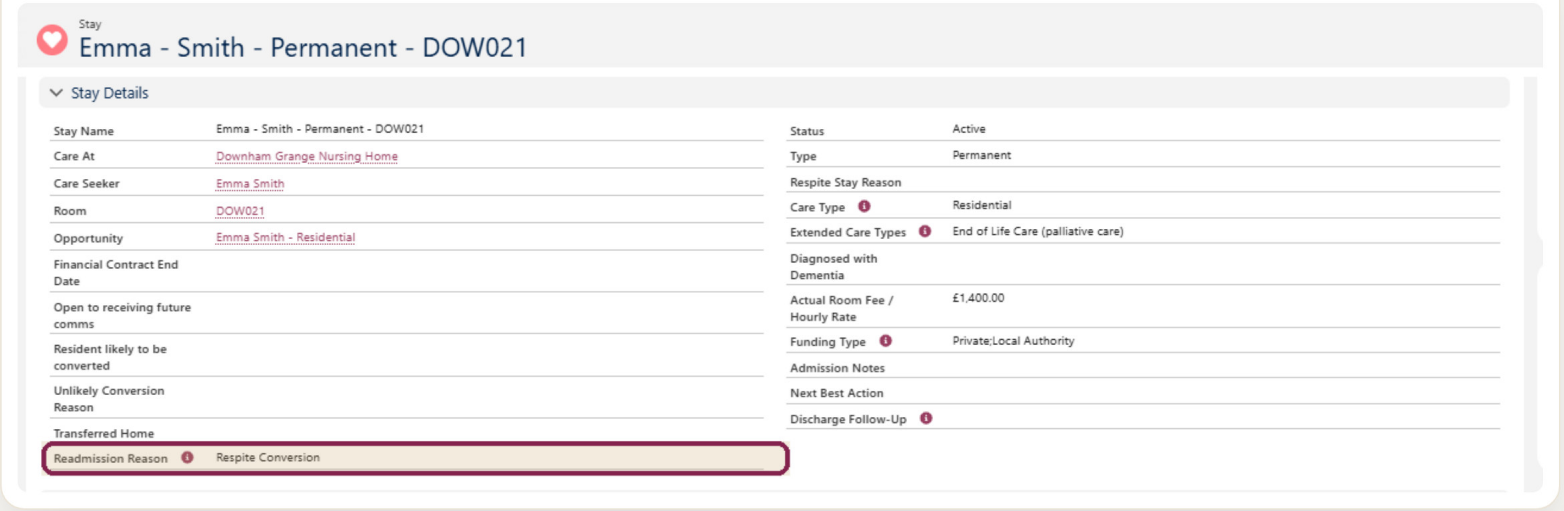
Home transfer

The previous home discharges and raises an opportunity for the new home, which completes the admission.

Home Transfer

SAMPLE RECORDS

STAY › DETAILS: READMISSION REASON



TO TAKE AWAY

Five things to remember.

1. **Contracts are made, signed and kept in Care Compass**
   Nothing to chase by e-mail, nothing to file: the signed PDF is already on the record.

2. **Funding Contributions is what you key into Coldharbour**
   One line per funding type: the amount, who is paying it, and the authority where it is LA, CHC or FNC.

3. **Two Completeds mean fully signed**
   Signing Status and Document Status both **Completed**; Current Signer Name tells you who to chase when they are not.

4. **Returning residents arrive as new admissions**
   Repeat stays, respite conversions and home transfers all look new; **Readmission Reason** tells you which it is.

5. **Two things do not change**
   Existing contracts stay in **FileStream**, and a mid-stay bank detail change still goes out as a **DocuSign** DD mandate.



Your questions

Any contract question: call the Care Compass team.

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