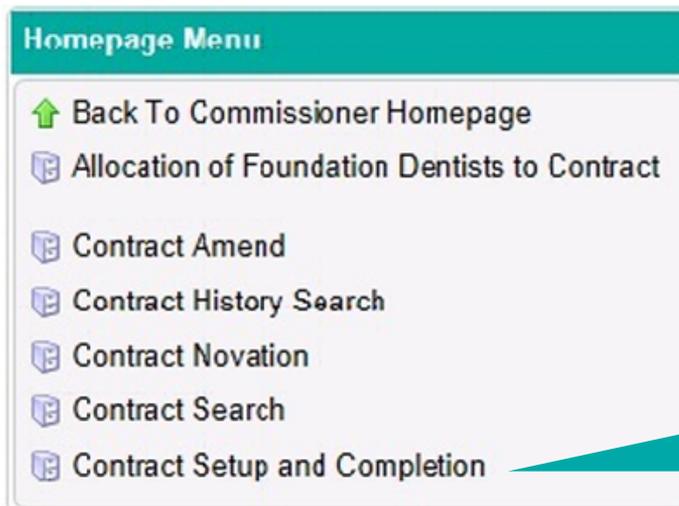
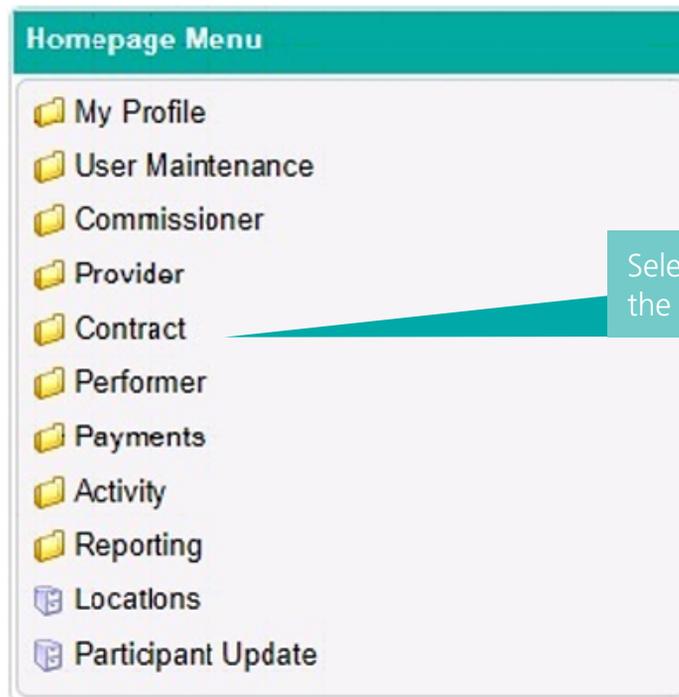


Compass - how to ...create a new contract

To create a new contract go the Contract option in the main menu



Step 1

General

Tip: If the provider, performer or location are new make sure you create these before you create the contract

Select contract type i.e. GDS/PDS

Enter location id for the contract or click on the create icon to create a new one

Enter the provider number or search for the provider by clicking on the search icon

Click to move to the next step in the process

Use this to set up Compass access for the provider

Only tick one of these boxes if you don't want the NHSBSA to pay the provider

Tip: Fields in Green are mandatory

Step 2

Services

Click on Create to add a service to the contract. This will bring up a pop up box

Display Service Values For Financial Year: 1516

Search: Service Name

Service Name	R/NR	Service Line Start Date	Service Line End Date	Performance Unit	1516 Value	1516 Target	1516 Carry Over	Action
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Records 0 to 0 of 0

Recurring Total: 0.00 Non-Recurring Total: 0.00 Total Contract Value: 0.00

Search: Performance Unit

Performance Unit	Target - Recurring	Target - Non-Recurring	Carry Over
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Records 0 to 0 of 0

Notify Provider

Functionality to allow providers to complete the contract set up process will become available later

Enter a start date for the service and if it's a non-recurring service you'll need to add an end date and tick the 'non recurring' box

Select the type of service you want to add to the contract, for GDS this must be 'Mandatory Services'

Add an annual value for the service or the full amount of the non-recurring funding

Add a performance target for the service

Contract Services

Service: Please Select

Non-Recurring:

Service Line Start Date: / /

Service Line End Date: / /

Effective From Date: Wednesday, 01 October 2014

Annual Value: 0.00

No Performance Targets:

Opt Out Reason: [Text Box]

Performance Target Unit: [Text Box]

Performance Target: [Text Box]

Service Details: [Text Box]

Search: Financial Year

Financial Year	1415	1516
Financial Value	0.00	0.00
Performance Target	0	0

Records 1 to 2 of 2

Carry Over

Search: Financial Year

Financial Year	Carry Over	Colling Exceeded Reason	Action
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Records 0 to 0 of 0

Add AddNew Cancel

Click Add to add the service to the contract or click Add/New to add this service and create another one for the contract

Search to find the performer you want to add to the contract

Employment Type	NPE/NPEE Start Date	NPE/NPEE End Date	NPE	NPEE	Action

Click to add the performer's NPE or NPEE

Click Add to add the performer to the contract or Add/Create to add a further performer

Enter the start date, and end date if you have one, for either the NPE or NPEE, NPE/NPEE is entered for the financial year so the end date must be 31/3 or before

Select the type of employment for the performer. If you select Agency or Incorporated you must enter an NPEE figure, even if the performer is a member of the NHS Pension scheme.

NPE/NPEE Start Date	
NPE/NPEE End Date	
Employment Type	Please Enter Start and End Dates
Pension Scheme Member	<input type="checkbox"/>
Net Pensionable Earnings	0.00
Net Pensionable Earnings Equivalent	0.00

Enter the amount of NPE or NPEE for the period. This will be determined by the employment type you have entered

Click Add to confirm the details for the performer. Click Add/New to confirm the current details and to add NPE/NPEE for another performer

Step 5

Performance targets

You can use this screen to enter individual activity targets for performers.

Enter the relevant performer number or click on Search

Select the type of target, UDA and or UOA for the financial year.

Enter the value of the target for the financial year

Click add to confirm the target or Add/New to confirm the target for this performer and add a further target for another performer

Contract Performer Contracted Activity

Performer

Forename

Surname

GDC Number

Contracted Activity

Financial Year

Activity Value

Step 6

Summary

At the end of the process you'll be presented with a summary screen showing all the information you've entered. You will then need to submit the contract for authorisation.

Home > Contracts List

1 General 2 Services 3 KPIs 4 Locations 5 Practitioners 6 P. Targets 7 Summary

Summary Step 7

Contract Summary
1A Dental Practice Limited (183547) Contract Start Date: 23/10/2014
Contract Number: 1002420000
Contract Location Address:
Special Needs Dental Clinic, Berkshire Road Clinic, Old Dean Estate,
CAMBERLEY, Surrey

GDS

Services	Start	End	Value		Activity		Units
			This Year	Annual	This Year	Annual	
Epidemiology	23/10/2014		£440,858.00	£1,000,000.00	441	1000	UDA
Mandatory Services	23/10/2014		£440.00	£1,000.00	44	100	UDA

Practitioner Details

Practitioner Name	NPE	NPEE
Mr Sindi	£100.00	£0.00

NB. Other Payments and/or deductions may apply to this contract e.g. for superannuation contributions and agreed standards entitlements

Click on Submit for Authorisation to send the contract to be authorised

Click on Generate summary pdf if you want to retain a copy of the contract summary for your records