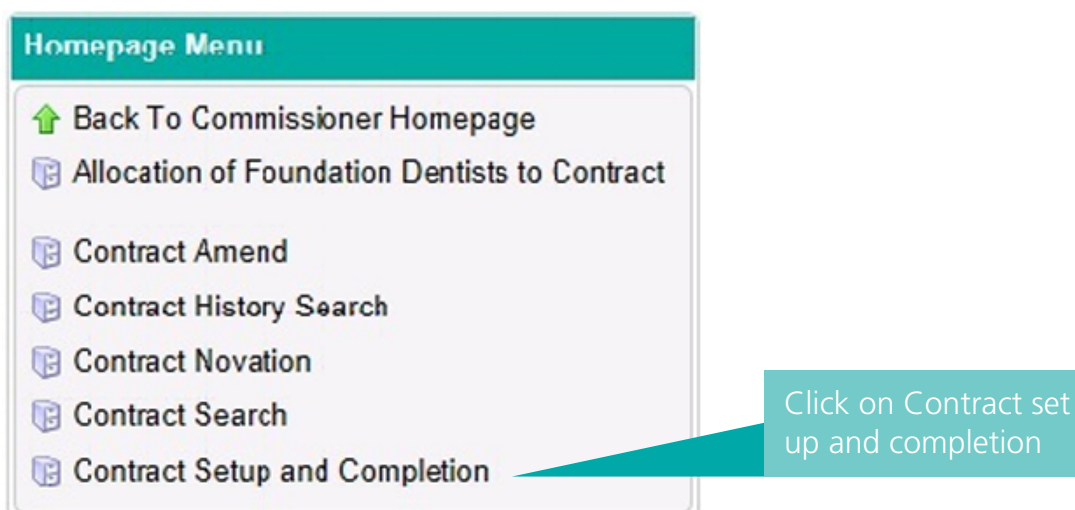
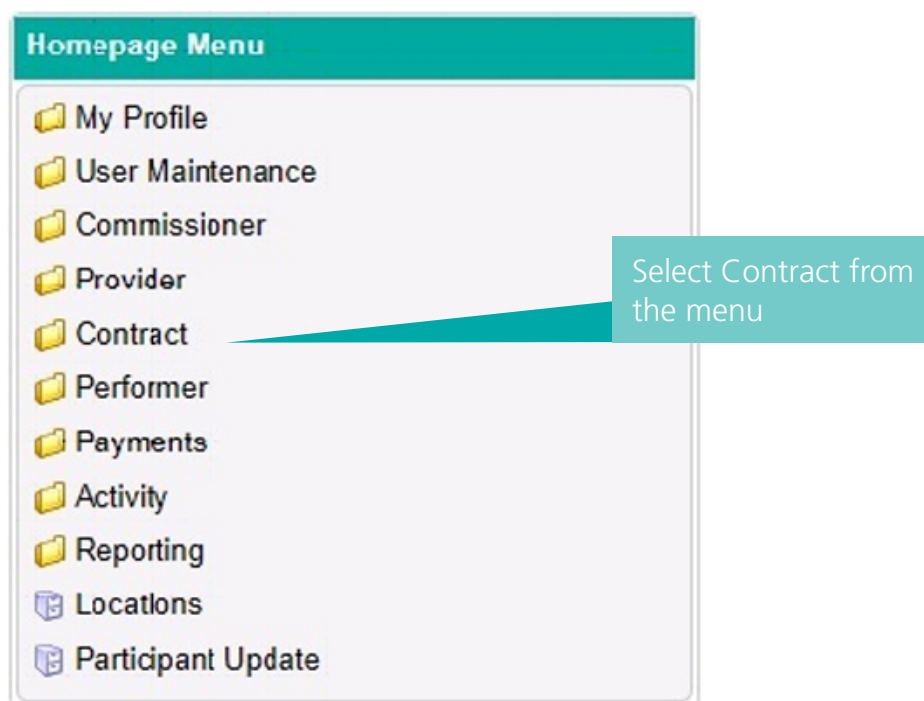


Compass - how to ...create a new contract

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



Click on Create

The process of setting up a contract has been simplified and has been broken down into 7 easy steps. When you complete each step you'll see the step name change to Green.

One of the key differences you'll notice when you create a new contract is that all new contract numbers will be a random 10 digit number.

Tip: Before you start the contract set up process make sure you have the details of the provider, performers and location to hand.

Tip: Once you've started creating a contract it will automatically save everything you've entered each time you click the Blue arrow to move to the next screen

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

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

Click to move to the next step in the process

Use this to set up Compass access for the provider

The screenshot shows a web application interface for creating a contract. At the top, there's a breadcrumb 'Home » Contracts List' and a series of numbered tabs: 1. General (active), 2. Services, 3. KPIs, 4. Locations, 5. Performers, 6. P. Activity, and 7. Summary. Below the tabs, the 'General - Step 1' section is titled 'Contract Details'. It contains two columns of form fields. The left column includes: 'Contract Number' (text box with '7A6'), 'Commissioner' (text box with 'Aneurin Bevan Health Board'), 'Contract Type' (dropdown menu with 'Please Select...'), 'Pilot' (checkbox), 'Provider' (text box with a search icon), 'Contract Location' (text box with a search icon), 'Address Title' (text box), 'Postcode' (text box), and 'Address' (text box). The right column includes: 'Contract Start Date' (calendar icon), 'Contract End Date' (calendar icon), 'Closure Reason' (dropdown menu with 'Please Select...'), 'Not Paid By NHSBSA' (checkbox), 'Data Collection Only Contract' (checkbox), 'Provider Effective Date' (text box), 'Landline Phone Number' (text box), 'Mobile Phone Number' (text box), 'Email Address' (text box), 'Website Address' (text box), and 'Contact Name' (text box). At the bottom right, there are two tabs: 'Bank Details' and 'Provider Owners'. A blue arrow points from the 'Provider Owners' tab to a callout box on the right.

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 ▶ Create

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

Records 0 to 0 of 0 Page 1/1

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

Records 0 to 0 of 0 Page 1/1

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 1/1

Service Line End Date 1/1

Effective From Date Wednesday, 01 October 2014

Annual Value 0.00

No Performance Targets ☐

Opt Out Reason

Performance Target Unit

Performance Target

Service Details

Search Financial Year ▶

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

Records 1 to 2 of 2 Page 1/1

Carry Over

Search Financial Year ▶ New

Financial Year	Carry Over	Carrying Exceeded Reason	Action

Records 0 to 0 of 0 Page 1/1

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

Tip:

Step 3

Locations

Click to add a treatment location i.e. practice address for the contract

Add the location ID if you know it or click on the green cross to search for a location or add a new one

Add	Add/Create	Cancel
-----	------------	--------

When completed click Add to add the location to the contract or Add/Create to add the current location and create a further one

Performers

Click to add performer(s) to the contract

[illegible]

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

Contract Performer

Performer ID
Forename
Surname
GDC Number
Correspondence Address
Performer Start Date
Performer End Date

NPE/NPEE

Search Employment Type Create

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

Records 0 to 0 of 0 Page 1 / 1

Add Add/Create Cancel

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

NPE/NPEE Start Date
NPE/NPEE End Date
Employment Type
Pension Scheme Member
Net Pensionable Earnings
Net Pensionable Earnings Equivalent

Add Add/New Cancel

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

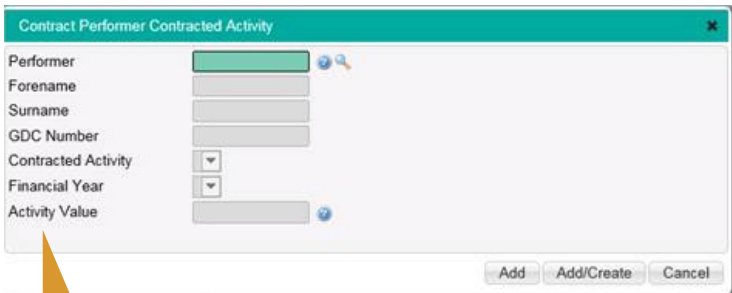
You can use this screen to enter individual activity targets for performers.

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

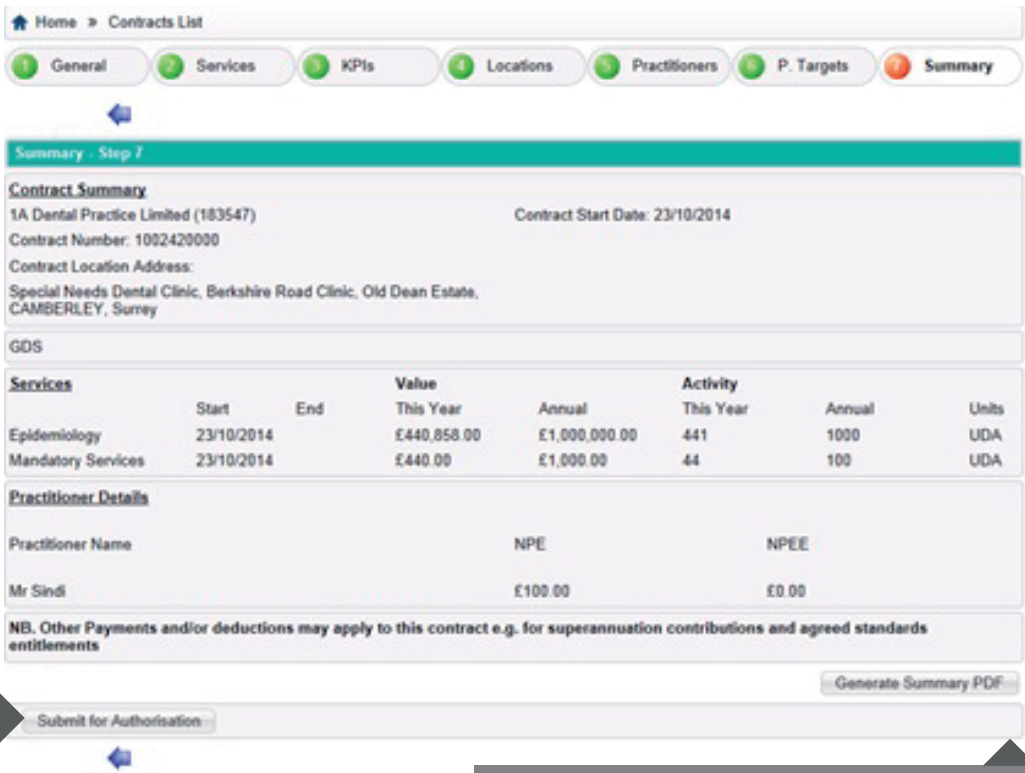
Click add to confirm the target or Add/New to confirm the target for this performer and add a further target for another performer



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

Generate Summary PDF

Submit for Authorisation

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