Compass - how to

... view, add and amend contract services, payments and adjustments

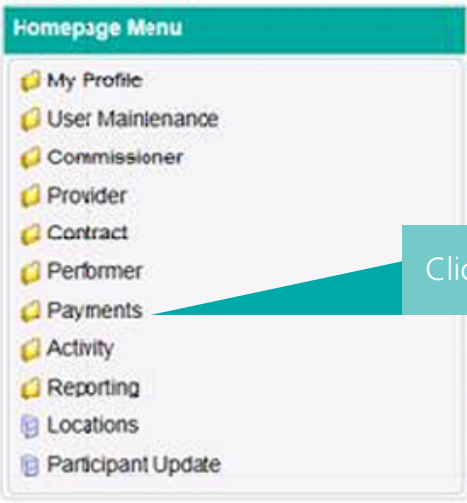In this guide we'll show you how to do the following:

- View payments
- Add and update a payment adjustment
- View contract service payments
- Add and update a payment adjustment
- Add / amend a service
- View services

Tip: The term Services in Compass is used to describe what used to known as baselines
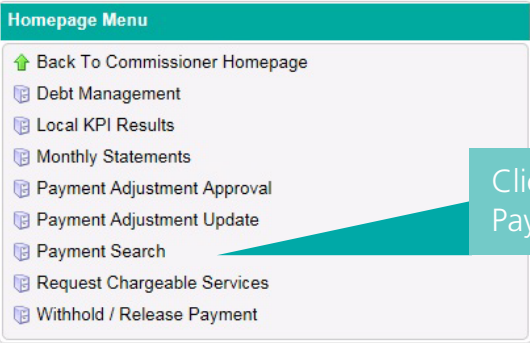
Step 1

Viewing payments

Commissioner Users Homepage

Homepage Menu

- My Profile
- User Maintenance
- Commissioner
- Provider
- Contract
- Performer
- Payments
- Activity
- Reporting
- Locations
- Participant Update

Click on Payments

Commissioner Users Homepage

Homepage Menu

- Back To Commissioner Homepage
- Debt Management
- Local KPI Results
- Monthly Statements
- Payment Adjustment Approval
- Payment Adjustment Update
- Payment Search
- Request Chargeable Services
- Withhold / Release Payment

Click on Payment Search

Tip: Use the Payment Search function when you want to search for payments made on a contract additional to the annual contract value. To view routine contract payments search under Contract > Services

Complete the appropriate search fields and click on Search to display the results

DCS416 - Payment Search

Home

Commissioner ID	Q59	Contract Start Date From		Minimum Payment Amount	
	Leicestershire and Lincolnshire AT	Contract Start Date To		Maximum Payment Amount	
Contract ID		Contract End Date From		Pay Period	08 - November
Payment Type	Both	Contract End Date To		Pay Year	1516

Search   Clear

Payments and Deductions | Receipts (Cleared Payments Only)

Search Contract ID

Contract ID	HBC	Provider	Start Date	End Date	Routine	Credits	Debits	Net Pay	Outstanding Debt	Action

Records 0 to 0 of 0   Page 1/1

DCS416 - Payment Search

Home

Commissioner ID		Contract Start Date From		Minimum Payment Amount	
		Contract Start Date To		Maximum Payment Amount	
Contract ID		Contract End Date From		Pay Period	08 - November
Payment Type	Both	Contract End Date To		Pay Year	1516

Search   Clear

Payments and Deductions | Receipts (Cleared Payments Only)

Search Contract ID

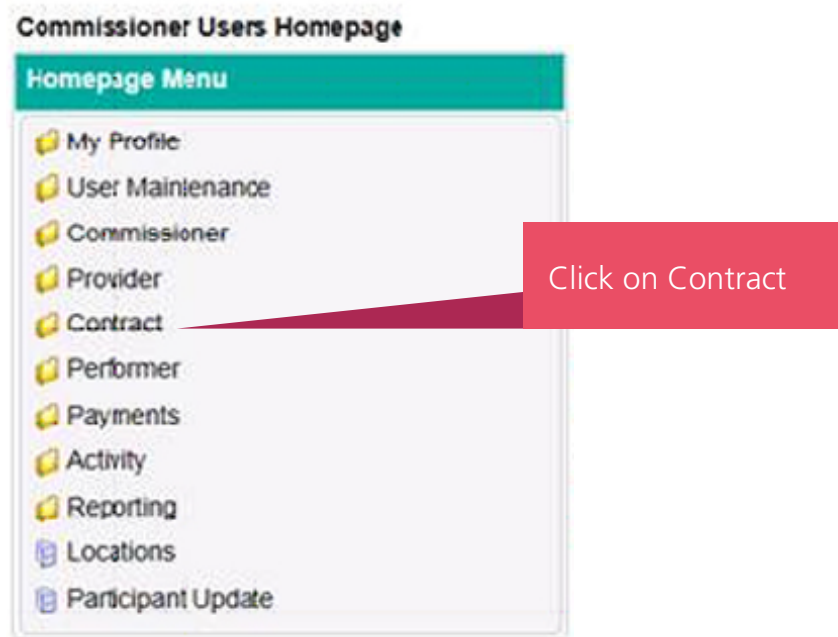| Contract ID	HBC	Provider	Start Date	End Date	Routine	Credits	Debits	Net Pay	Outstanding Debt	Action
	Q59		01/04/2008		Y	1399.30	47.37	1351.93	0.00	Contract Pay Detail
	Q59		01/04/2008	31/03/2017	Y	1453.64	0.00	1453.64	0.00	Contract Pay Detail
	Q59		01/12/2007		Y	5061.11	129.99	4931.12	0.00	Contract Pay Detail
	Q59		01/02/2013		Y	21946.50	0.00	21946.50	0.00	Contract Pay Detail
	Q59		01/04/2008		Y	27132.06	569.79	26562.27	0.00	Contract Pay Detail
	Q59		01/04/2009		Y	8689.36	309.14	8380.22	0.00	Contract Pay Detail
	Q59		01/04/2010	31/03/2016	Y	16749.56	1646.50	15103.06	0.00	Contract Pay Detail
	Q59		01/04/2008		Y	4156.21	163.76	3992.45	0.00	Contract Pay Detail
	Q59		01/04/2008		Y	3420.09	45.20	3374.89	0.00	Contract Pay Detail
	Q59		01/04/2008		Y	5673.87	151.25	5522.62	0.00	Contract Pay Detail
	Q59		01/04/2008		Y	18416.27	1651.71	16764.56	0.00	Contract Pay Detail
	Q59		01/04/2008		Y	4362.21	99.08	4263.13	0.00	Contract Pay Detail
	Q59		29/08/2008	31/03/2016	Y	35434.49	925.04	34509.45	0.00	Contract Pay Detail
	Q59		01/04/2008	31/03/2016	Y	35434.49	0.00	35434.49	0.00	Contract Pay Detail
	Q59		01/04/2008		Y	11621.66	320.13	11301.53	0.00	Contract Pay Detail

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Use these fields to refine your search. Click on Contract Pay Detail to view the details of the payment in the pay statement

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📇 Locations
📇 Participant Update

Click on Contract

The select Contract Search

DC S419 - Contract Search

🏠 Home

Contract ID		Provider Name		Contract Status	Open ▾
Performer ID		Provider Owners		Minimum Contract Value	
Health Body Code		Contract Type:	Please Select... ▾	Maximum Contract Value	
Provider ID		Start Date			
		End Date		Service Type Applied:	Please Select... ▾

Search   Clear

Complete the relevant search fields then click on Search

DCS048 - Contract View

🏠 Home » Contracts List

You can change the financial view to view by clicking on the drop down list

General
Services
Treatment Locations
Performers
Performer Performance Targets
Contract Events
Summary

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
Mandatory Services	R	01/04/2006		UDA	564386.20	26129	0.00	View

Records 1 to 1 of 1   ◀◀ ◀ Page 1/1 ▶ ▶▶

This screen shows you a breakdown of service payments and associated activity levels

Recurring Total	564386.20	Non-Recurring Total	0.00	Total Contract Value	564386.20

Search Performance Unit ▾ [   ] ▶

Performance Unit	Target - Recurring	Target - Non-Recurring	Carry Over
UDA	26129	0	0.00

Records 1 to 1 of 1   ◀◀ ◀ Page 1/1 ▶ ▶▶

Step 3

Add or update a payment adjustment

Commissioner Users Homepage

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📋 Debt Management
📋 Local KPI Results
📋 Monthly Statements
📋 Payment Adjustment Approval
📋 Payment Adjustment Update
📋 Payment Search
📋 Request Chargeable Services
📋 Withhold / Release Payment

Select Payment Adjustment Update

DCS207 - Payment Adjustment Update

🏠 Home

Payment Adjustment Type		Payment Adjustment Status	Please Select...
Performer ID		Contract ID	
Commissioner ID	Q59 Leicestershire and Lincolnshire AT		
From Payment Adjustment Date		To Payment Adjustment Date	

Search Clear

Search Payment Adjust ID ▼ [   ] ▶   Create Payment Adjustment

Payment Adjustment ID	▲ Payment Adjustment Date	Payment Adjustme...	Contract ID	Provider Name	Performer	Pay To	Status	Action

Search for an existing payment adjustment by completing the relevant fields and then click on Search

Records 0 to 0 of 0   ◄ Page 1/ 1 ► ►|

Or create a new one by clicking on Create Payment Adjustment

To find the type of adjustment you want to create click on the Search icon

Create Payment Adjustment ✕

Payment Adjustment Type	[ ] 🔍 ❓	Narrative	[ ]
Reason	▶		

Attachments   Save Save/Create Cancel

You can upload supporting documentation if you want to, or add some narrative text

To save the adjustment click Save. To save the current adjustment and create a new one click Save/Create

You will then be presented with a further screen to complete. That screen will be dependent on the type of adjustment you wish to create.

Step 4

Add and amend services

Commissioner Users Homepage

Homepage Menu

- My Profile
- User Maintenance
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- Payments
- Activity
- Reporting
- Locations
- Participant Update
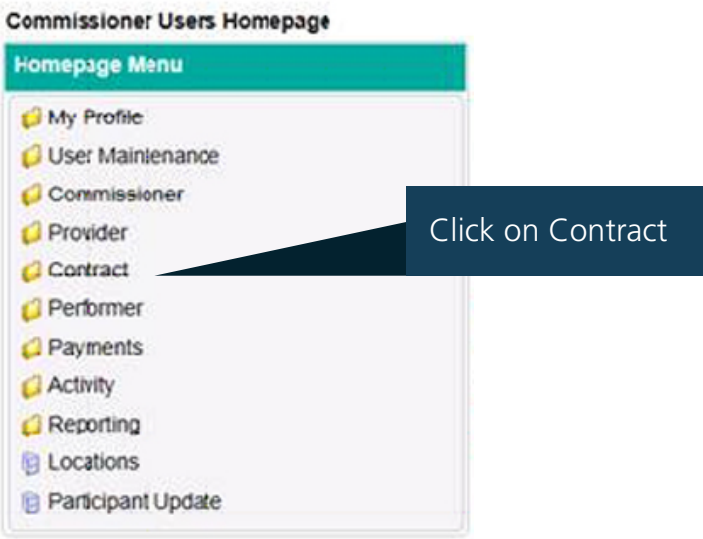
Click on Contract

Then select Contract Amend

You can refine your search or click on Edit against the contract you want to view

DCS047 - Contract Amend

🏠 Home

Search: Contract No

Contract No	Commissioner Name	Provider	Contract Type	Contract Start Date	Contact End Date	Status	Action
			GOS	01/04/2006		Active	Edit
			POS	01/04/2006	31/03/2017	Active	Edit
			GOS	01/12/2007		Active	Edit
			GOS	01/02/2013		Active	Edit
			GDS	01/04/2008		Active	Edit
			GDS	01/04/2006		Active	Edit
			POS Plus	01/04/2010	31/03/2016	Active	Edit
			GDS	01/04/2006		Active	Edit
			GOS	01/04/2006		Active	Edit
			GDS	01/04/2006		Active	Edit
			GDS	01/04/2006		Active	Edit
			GDS	01/04/2006		Active	Edit
			POS	29/08/2006	31/03/2016	Active	Edit
			POS	01/04/2006	31/03/2016	Active	Edit
			POS	03/11/2008	31/03/2016	Active	Edit

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DCS047 - Contract Amend

🏠 Home » Contracts List

General
Services
Treatment Locations
Performers
Performer Performance Targets
Contract Events

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
Mandatory Services	R	03/11/2008	31/03/2015	UDA	0.00	0	0.00	Edit ▾

Records 1 to 1 of 1 | ◄ ◄ 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
UDA	0	0	0.00

Records 1 to 1 of 1 | ◄ ◄ Page 1/1 ► ►|

Submit

Click on Create to add a new service to the contract

Click on Edit to amend an existing service on the contract

Click on submit to action the amendment

Step 5   **View services**

Commissioner Users Homepage

Homepage Menu

📁 My Profile
📁 User Maintenance
📁 Commissioner
📁 Provider
📁 Contract
📁 Performer
📁 Payments
📁 Activity
📁 Reporting
📁 Locations
📁 Participant Update

Click on Contract

Then click on Contract Search

Complete the relevant search fields and then click on Search

DCS419 - Contract Search

🏠 Home

Contract ID			Provider Name		Contract Status	Open ▾
Performer ID			Provider Owners			
Health Body Code	Q59		Contract Type:	Please Select... ▾	Minimum Contract Value	
	Leicestershire and Lincolnshire AT		Start Date	🗓		
Provider ID		🔍	End Date	🗓	Maximum Contract Value	
					Service Type Applied:	Please Select... ▾

Search   Clear

Search Contract ID ▾ [   ] ▶   Export Grid Data

Contract ID	HBC	Provider Name	Type	Contract Start Date	Contract End Date	Status	Total Value	Contact Name	Contract Address	Post Code	Email Address	Phone	Action

The search results will be displayed here. Click on View in the Action column to view the details of that contract

Use these fields to refine your search

DCS048 - Contract View

🏠 Home » Contracts List

General
Services
Treatment Locations
Performers
Performer Performance Targets
Contract Events
Summary

Display Service Values For Financial Year   [1 16 ▾]

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
Mandatory Services	R	01/04/2006		UDA	564386.20	26129	0.00	View

Click to view the details of the payment

Records 1 to 1 of 1   ⏮ ◀ Page 1/1 ▶ ⏭

Recurring Total	564386.20	Non-Recurring Total	0.00	Total Contract Value	564386.20

Search Performance Unit ▾ [   ] ▶

Performance Unit	Target - Recurring	Target - Non-Recurring	Carry Over
UDA	26129	0	0.00

Records 1 to 1 of 1   ⏮ ◀ Page 1/1 ▶ ⏭

Contract Services

Service	Please Select... ▼
Non-Recurring	☐
Service Line Start Date	03/11/2008 📅 ⓘ Monday, 03 November 2008
Service Line End Date	31/03/2016 📅
Effective From Date	03/11/2008 Monday, 03 November 2008
Annual Value	0.00
No Performance Targets	☐
Opt Out Reason	
Performance Target Unit	
Performance Target	
Service Details	

Search Financial Year ▼ ▶

Financial Year	0910	1011	1112	1213	1314	1415	1516
Financial Value	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Performance Target	0	0	0	0	0	0	0

Records 1 to 2 of 2 |◀ ◀ Page 1/1 ▶ ▶|

Carry Over | History

Search Financial Year ▼ ▶   Create

Financial Year	Carry Over	Ceiling Exceeded Reason	Action

Records 0 to 0 of 0 |◀ ◀ Page 1/1 ▶ ▶|

Add   Add/Create   Cancel

General Contract Details

Contract Number:			Contract Start Date	01/04/2006 📅 ⓘ
Commissioner		Greater Manchester AT	Contract End Date	📅
Contract Type	▼		Closure Reason	▼
Pilot	☐		Not Paid By NHSBSA	☐
Provider			Data Collection Only Contract	☐
Contract Location	ⓘ ➕		Provider Effective Date	07/01/2006
Address Title			Landline Phone Number	
Postcode			Mobile Phone Number	
Address			Email Address	
			Website Address	
			Contact Name	Unknown

Submit