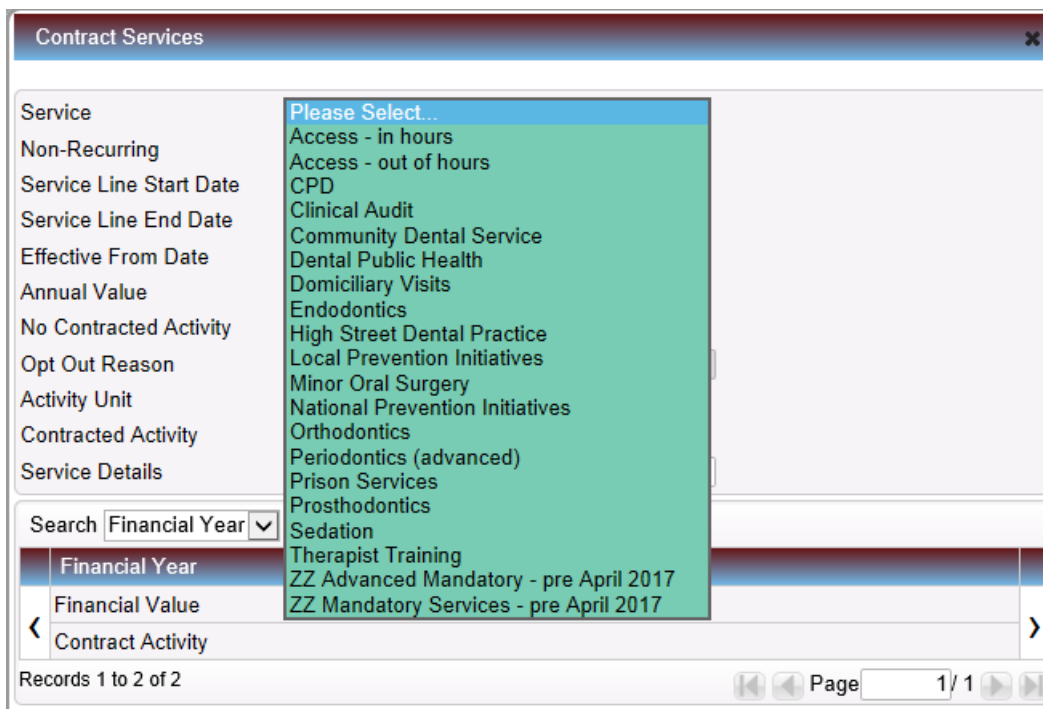


## How to set up Service Lines in Compass

It is possible to record separate values for the different services that a contract delivers. These are called Service Lines.

There are a number of different types of Service Lines to choose from as shown below;

**NB.** Please note that ZZ Advanced Mandatory- Pre 2017 and ZZ Mandatory Services – pre 2017 should not be used for any new service lines.



Each Service Line has its own start and end dates, value and contracted activity and the amounts are totalled to create the Total Contract Value for the year.

Service Lines can be recurring or non-recurring.

### Recurring Service Lines.

For **recurring** Service Lines an **annual value** should be entered, if the service starts or ends part way through the year the system will pro-rate the value and activity accordingly.

1. Full value for full year – you will see in the Financial Year table at the bottom the annual value of £12,000 and UDA of 4000 which starts of 01/04/2019 is present for current and next financial year.

Contract Services
✕

Service: High Street Dental Practice ▼

Non-Recurring:

Service Line Start Date: 01/04/2019 12 Monday, 01 April 2019

Service Line End Date:

Effective From Date: 01/04/2019

Annual Value: 12000.00

No Contracted Activity:

Opt Out Reason:

Activity Unit: UDA

Contracted Activity: 4000

Service Details:

---

Search Financial Year ▼  ▶

Financial Year	1920	2021
Financial Value	12000.00	12000.00
Contract Activity	4000	4000

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

2. Full value for part year – you will see in the Financial Year table at the bottom the annual value of £12,000 and UDA of 400 which starts of 01/10/2019 is pro-rated for current year and then shows the full value for next financial year

**Contract Services**

Service: High Street Dental Practice

Non-Recurring:

Service Line Start Date: 01/10/2019 Tuesday, 01 October 2019

Service Line End Date: [Empty]

Effective From Date: 01/10/2019

Annual Value: 12000.00

No Contracted Activity:

Opt Out Reason: [Empty]

Activity Unit: UDA

Contracted Activity: 400

Service Details: [Empty]

---

Search Financial Year [Empty]

Financial Year	1920	2021
Financial Value	6000.00	12000.00
Contract Activity	200	400

Records 1 to 2 of 2 Page 1/1

---

**Carry Over** History

Search Financial Year [Empty] Create

Financial Year	Carry Over	Ceiling Exceeded Reason	Action

Records 0 to 0 of 0 Page 1/1

Add Add/Create Cancel

## Non Recurring Service Lines.

For **non-recurring** Service Lines, the 'non-recurring' indicator below the Service type field needs to be ticked. The value entered will be the **actual amount** the contract is to be paid for the duration of the service delivery. A non-recurring service line must have an end date and cannot span multiple financial years.

When the Non-Recurring box is ticked the Annual Value is amended to read 'Service Value for the Period' the amount entered is not affected by the dates and no pro-rating takes place.

Contract Services
✕

---

Service: Access - in hours ▼

Non-Recurring:  ⓘ

Service Line Start Date: 01/10/2019 ⓘ Tuesday, 01 October 2019

Service Line End Date: 31/03/2020 ⓘ Tuesday, 31 March 2020

Effective From Date: 01/10/2019 Tuesday, 01 October 2019

Service Value for Period: 12000.00 ⓘ

No Contracted Activity:  ⓘ

Opt Out Reason:

Activity Unit: UDA

Contracted Activity: 400

Service Details:

Search Financial Year ▼  ▶

Financial Year	1920
Financial Value	12000.00
Contracted Activity	400

Records 1 to 2 of 2 Page 1 / 1

---

Carry Over
✕

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

Where there are multiple service lines the 'Services Tab' list them all and totals them for the Financial Year to give the Total Contract Value.

Display Service Values For Financial Year 1920

Search Service Name  Create

Service Name	R/NR	Service Line Start Date	Service Line End Date	Activity Unit	1920 Value	1920 Activity	1920 Carry Over	Action
High Street Dental Practice	R	01/04/2019		UDA	120000.00	4000	0.00	Edit
Access - in hours	NR	01/10/2019	31/03/2020	UDA	12000.00	400	0.00	Edit

Records 1 to 2 of 2 Page 1/1

Recurring Total 120000.00 Non-Recurring Total 12000.00 Total Contract Value 132000.00

Search Activity Unit

Activity Unit	Activity - Recurring	Activity - Non-Recurring	Carry Over
UDA	4000	400	0.00

Records 1 to 1 of 1 Page 1/1

## Amending Service Lines.

For **recurring** Service Lines if the end date is changed the **'Annual value'** and **contracted activity** will be pro-rated accordingly.

For **non-recurring** Service Lines if the end date is changed the **'Service Value for the Period'** and contracted activity **will not** automatically change if the value needs to be increased or reduced, this will have to be done manually.

## Effective From Date

Within the creation and amendment of Service Lines there is a field called 'Effective From Date' this date defaults to the start date of the service line when it is created and is then used as a date from which changes are made.

Once a future effective from date has been entered it cannot be amended back to a date any earlier than the current date (i.e.the date you are making the change).

In the example below the Service Line started on 01/01/2018 and was then increased with an 'Effective from date' of 01/04/2019 this is also reflected in the Financial Year Table in the middle of the screen shot;

**Contract Services** [X]

Service: High Street Dental Practice [v]

Non-Recurring:

Service Line Start Date: 01/01/2018 [calendar] Monday, 01 January 2018

Service Line End Date: [calendar]

Effective From Date: 01/04/2019 [calendar] Monday, 01 April 2019

Annual Value: 901794.73

No Contracted Activity:

Opt Out Reason: [text box]

Activity Unit: UDA

Contracted Activity: 29053

Service Details: GDS

---

Search Financial Year [v] [text box] [arrow]

Financial Year	1718	1819	1920	2021
Financial Value	220291.83	895970.92	901794.73	901794.73
Contract Activity	7263	29053	29053	29053

Records 1 to 2 of 2 Page 1/1

---

**Carry Over** | History

Search Financial Year [v] [text box] [arrow] [Create]

Financial Year	Carry Over	Ceiling Exceeded Reason	Action

Records 0 to 0 of 0 Page 1/1

[Amend] [Amend/Create] [Cancel]

If the user now wishes to increase the value and contracted activity from 01/04/2020 they would enter the new values and enter an effective from date of 01/04/2020, you can see that the Financial Year Table now shows a different value for 20/21.

**Contract Services**

Service: High Street Dental Practice

Non-Recurring:

Service Line Start Date: 01/01/2018 (Monday, 01 January 2018)

Service Line End Date: [Empty]

Effective From Date: 01/04/2020 (Wednesday, 01 April 2020)

Annual Value: 950000.00

No Contracted Activity:

Opt Out Reason: [Empty]

Activity Unit: UDA

Contracted Activity: 30000

Service Details: GDS

---

Search Financial Year [Dropdown] [Input] [Search]

Financial Year	1718	1819	1920	2021
Financial Value	220291.83	895970.92	901794.73	950000.00
Contract Activity	7263	29053	29053	30000

Records 1 to 2 of 2 Page 1 / 1

---

**Carry Over** | History

Search Financial Year [Dropdown] [Input] [Search] [Create]

Financial Year	Carry Over	Ceiling Exceeded Reason	Action

Records 0 to 0 of 0 Page 1 / 1

[Amend] [Amend/Create] [Cancel]

When the user selects 'Amend' a warning message is displayed to ensure that they have entered the correct 'Effective from Date'

**Please confirm**

The current Effective From Date for this service line is 01/04/2020 – Is this correct?

[Yes] [No]

If the user had wished to increase the value and contracted activity mid year for example from 01/10/2019 they would enter the new values and enter an effective from date of 01/10/2019, you can see that the Financial Year Table has now prorated the value for 19/20 (6 months at £901794.73 and 6 months at £100,000) and the Value for 20/21 is £950,000.

Contract Services
✕

Service: High Street Dental Practice

Non-Recurring:

Service Line Start Date: 01/01/2018 (Monday, 01 January 2018)

Service Line End Date:

Effective From Date: 01/10/2019 (Tuesday, 01 October 2019)

Annual Value: 950000.00

No Contracted Activity:

Opt Out Reason:

Activity Unit: UDA

Contracted Activity: 30000

Service Details: GDS

---

Search Financial Year

Financial Year	1718	1819	1920	2021
Financial Value	220291.83	895970.92	925897.37	950000.00
Contract Activity	7263	29053	29527	30000

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

Amend Amend/Create Cancel

As previously stated once an 'Effective from date' has been set in the future you cannot amend it to a date earlier than the current date. Therefore if a new value for the next financial year has been added you cannot then amend the current year value. It may therefore be preferable to enter an end date on the current service line and create a new one for the new financial year.