



# Getting to Know COMPASS

Overview for Community Partners  
April 2018 Update

 Click the Resources tab above for a text-only version of this training.

 This module contains narration. Please adjust your volume settings.

[Click Next to Begin](#)

This overview is narrated. Please take a moment to adjust your computer's volume now.

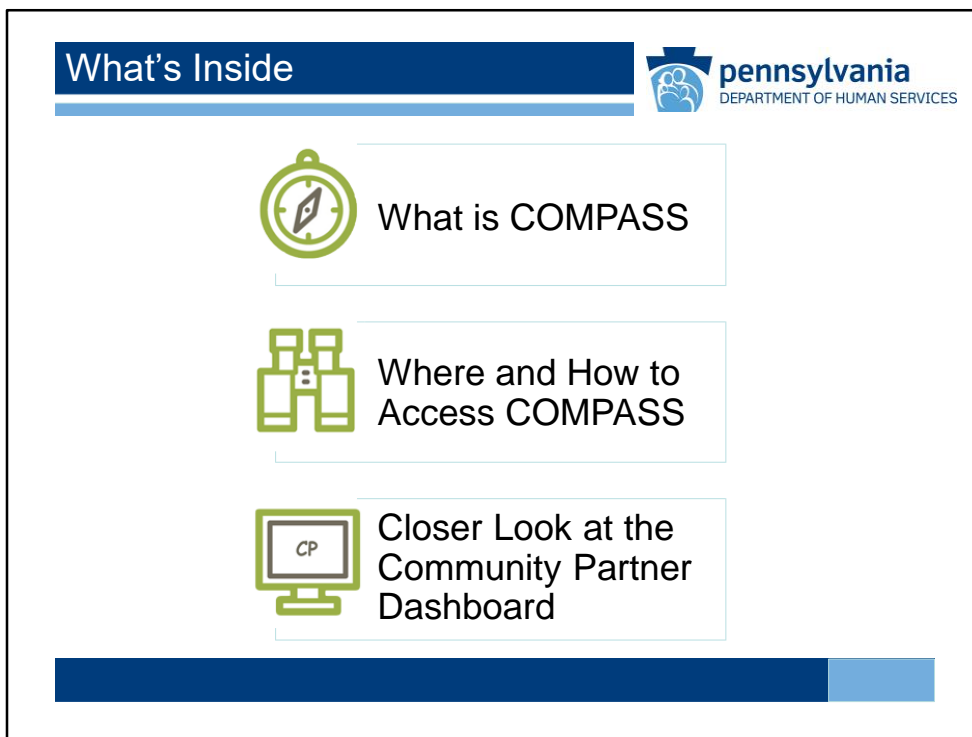


Welcome to the COMPASS Overview for Community Partners!

You'll see that most slides will advance automatically; however, you may use the player controls at the bottom of the screen to pause the player or move forward or back if needed. You may skip to another section of the overview using the menu to the left.

If you would like a text-only version of this overview, you may access a copy from the resources tab at the top of this screen.

When you're ready to begin, click the "Next" button.



This overview will give you a sneak peek at what COMPASS has to offer. It will help you familiarize yourself with many of the COMPASS screens and functions that you will see and use as a Community Partner.

For more information about the general COMPASS features for individual and family applicants and recipients, you may view the Getting to Know COMPASS Overview for Individuals and Families.

It is recommended that you view the sections in the order they appear on the screen, beginning with “What is COMPASS,” however, you may skip directly to another section. Click the Next button to continue or choose an icon to jump to a section.



COMPASS is an acronym that stands for Commonwealth of Pennsylvania Access to Social Services. COMPASS is sort of like an online department store that offers one-stop shopping for many health and human service needs.

What is COMPASS?



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The image is a slide titled "What is COMPASS?". It features a central photograph of a man and a woman sitting on a couch, smiling and looking at a laptop. The man is on the left, wearing a light blue shirt, and the woman is on the right, wearing a white top. The background is a bright, modern interior. To the right of the photo is the Pennsylvania Department of Human Services logo, which includes a stylized blue icon of a person and the text "pennsylvania DEPARTMENT OF HUMAN SERVICES". The slide has a blue header bar with the title and a blue footer bar.

COMPASS is used to:

- Learn about and see if individuals or families qualify for Department of Human Services (DHS) benefits,
- Apply for and renew DHS benefits,
- Manage DHS benefits,
- And Receive referrals to other benefits not available on COMPASS.



Users can find COMPASS with a home computer or by using the myCOMPASS PA mobile app on your smartphone. The app is not optimized for use on a tablet. Users can also access the full site using a smartphone or tablet.

Note that the Community Partner Dashboard is not supported on the app.

The COMPASS website can be found at: [www.compass.state.pa.us](http://www.compass.state.pa.us), and the app can be downloaded from a smartphone or tablet.

**Benefits of Using COMPASS**

Easy to use  
Available 24/7  
No need to leave home  
Safe, secure, confidential  
One application for multiple benefits  
Routed to the correct agency  
Referrals to other services

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There are many benefits to using COMPASS:

COMPASS is convenient and easy to use.

COMPASS is available 24 hours a day, 7 days a week.

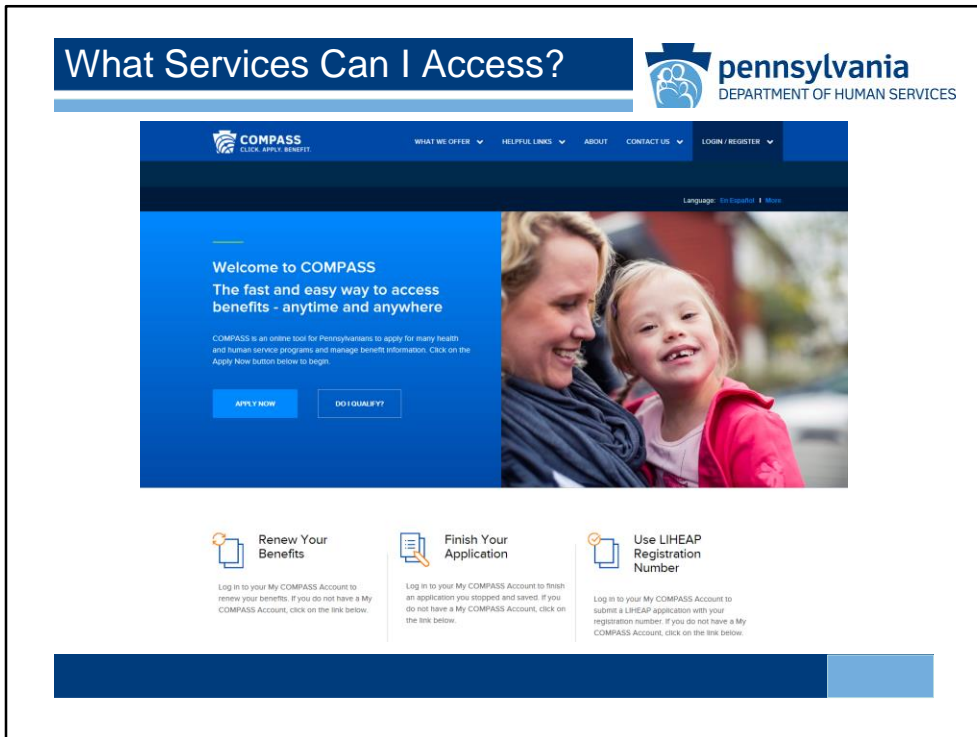
COMPASS can be accessed without leaving home or calling your County Assistance Office

COMPASS is safe, secure, and confidential.

COMPASS allows you to complete one application for multiple benefits.

COMPASS sends your application to the right agency for review.


COMPASS can submit referrals for other services.




With COMPASS users can access these services: Health Care (including CHIP, Medical Assistance, and Medical Assistance for Former Foster Care Youth), SNAP, School Meals, Cash Assistance, LIHEAP or Energy Assistance, Child Care Works, and Long Term Care.


Users can also easily navigate from COMPASS to the Federally Facilitated Marketplace. Or you can submit referrals to Home and Community Based services, such as Autism Services, Early Intervention Services, and Intellectual Disability Services.



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 **What is COMPASS**

 **Where and How to Access COMPASS**

 **Closer Look at the Community Partner Dashboard**

Now that we know what COMPASS can do, next we'll look a little closer at where and how to access COMPASS.

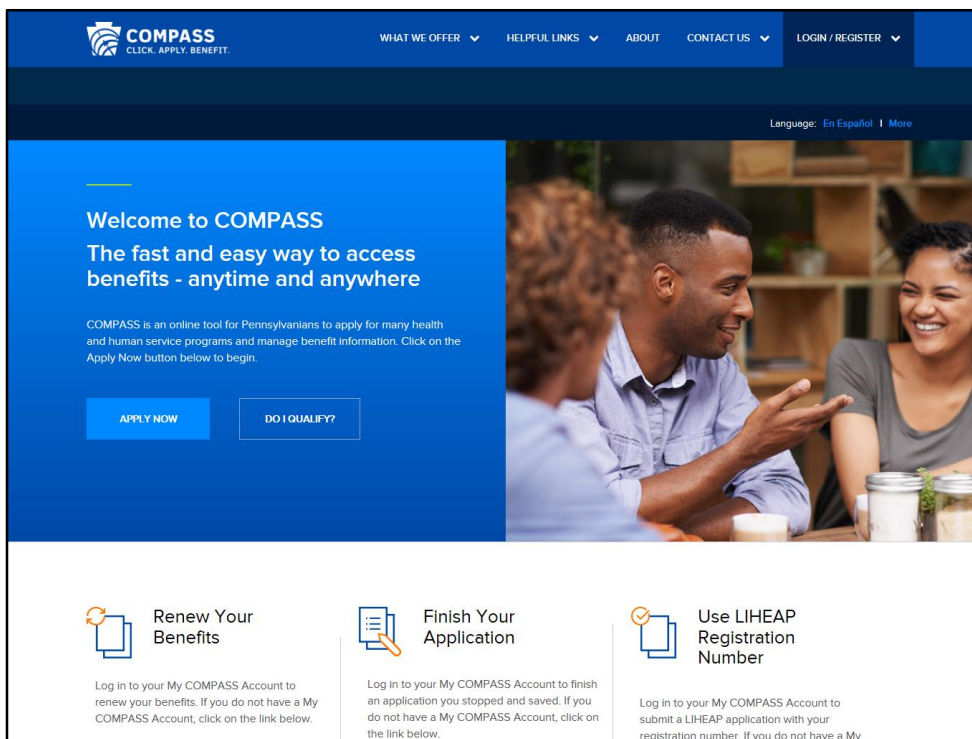
Where to Access COMPASS



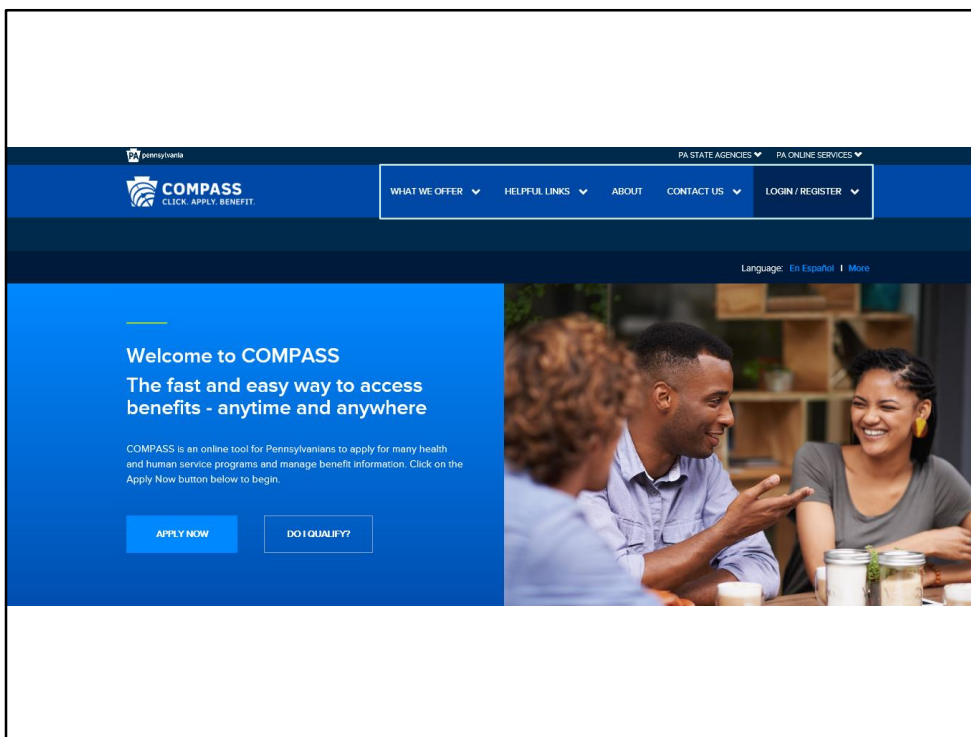
[www.compass.state.pa.us](http://www.compass.state.pa.us)

We already mentioned that you can find the COMPASS website at: [www.compass.state.pa.us](http://www.compass.state.pa.us).

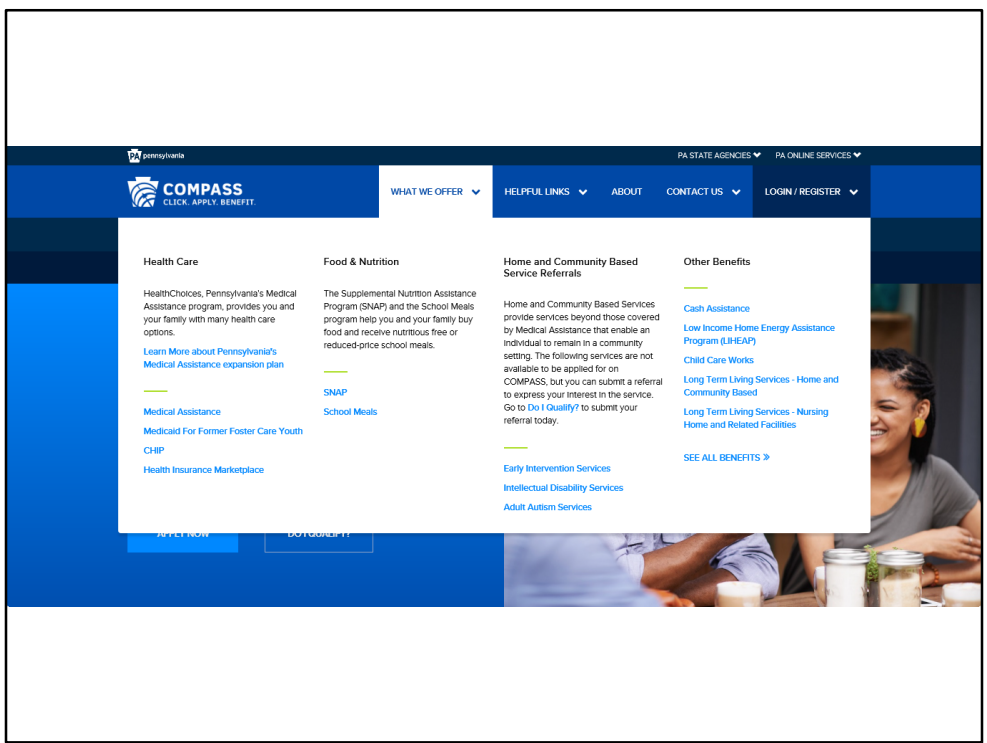
Let's take a look at it now.



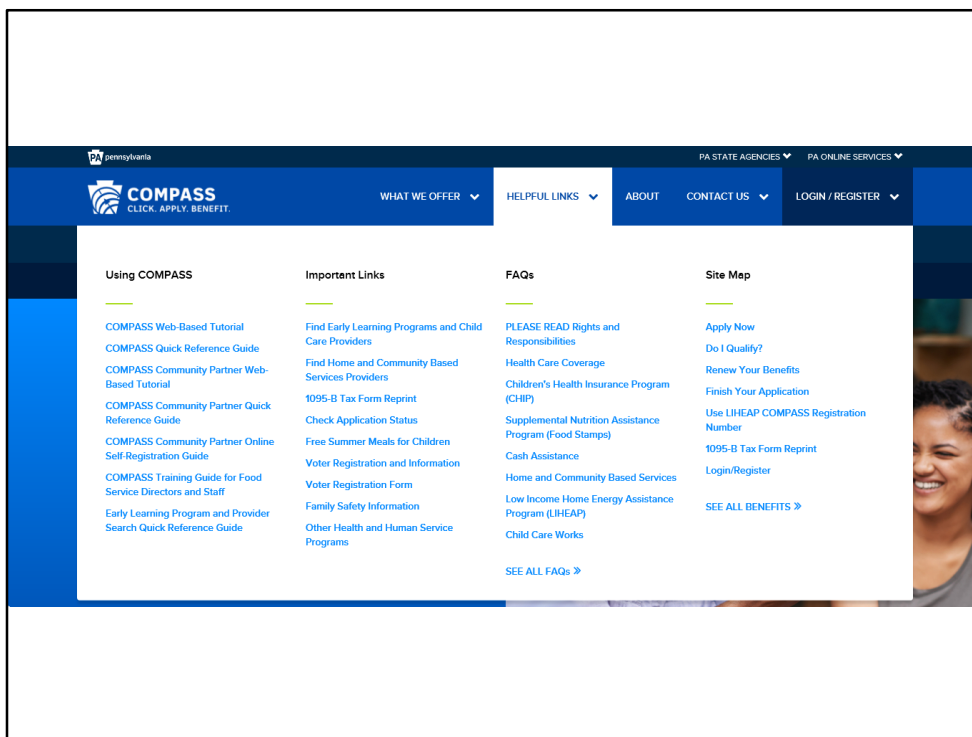
You'll be directed to this screen first.  
There are many places you can go from here. Let's take a look around.



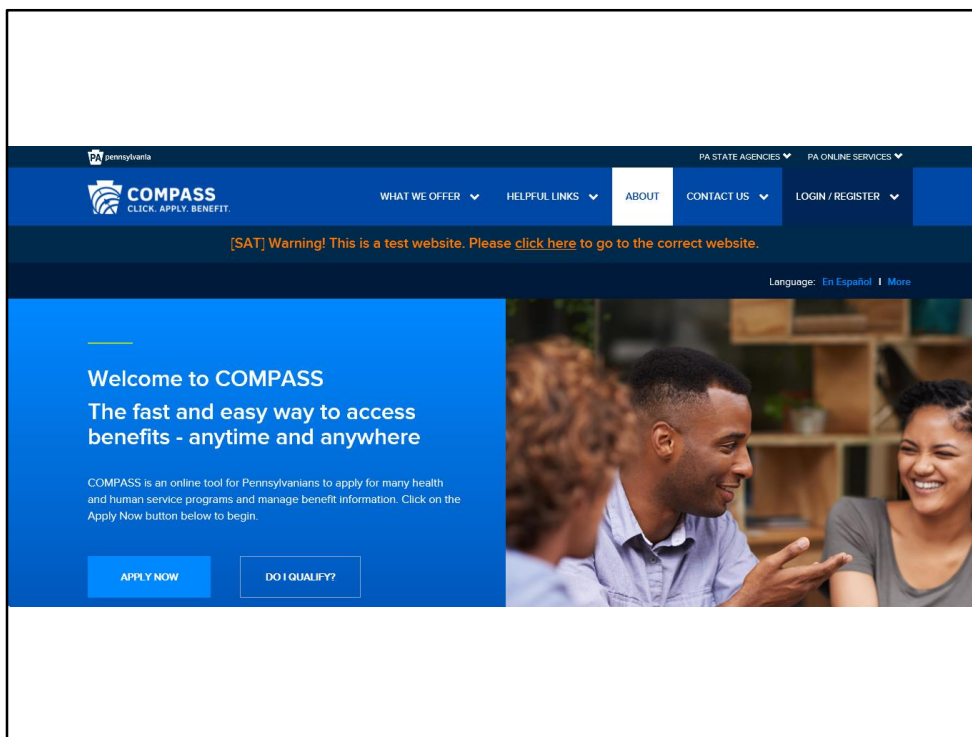
At the top of the screen you can put your cursor over the menu items to see what's in each one. Let's see what's there.



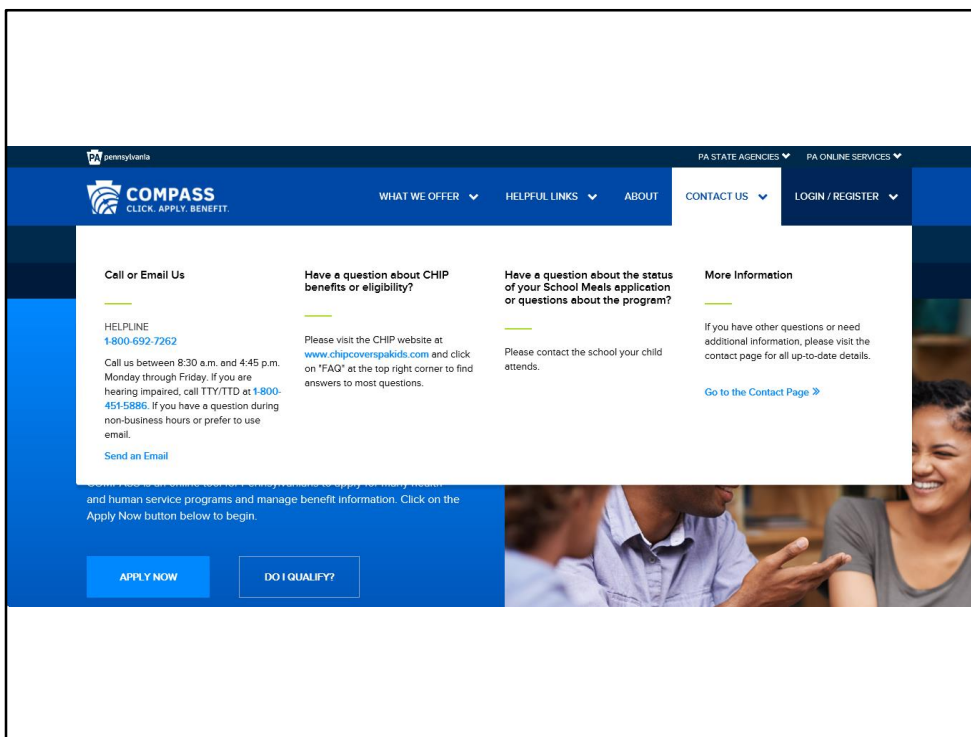
What We Offer provides links to give you more information about the DHS benefits that you can access.



Helpful Links gives you access to specific information on Using COMPASS and answers questions you may have about DHS benefits and programs. From here you can also jump directly to other areas of COMPASS.

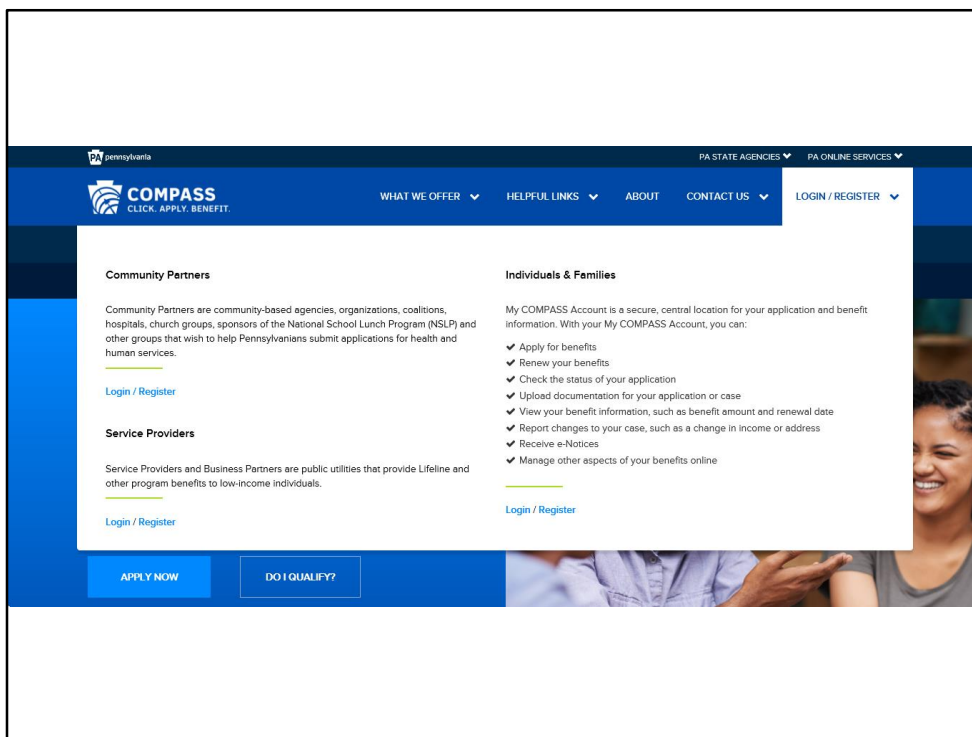


About provides general information about COMPASS and instructions for downloading the myCOMPASS PA app.

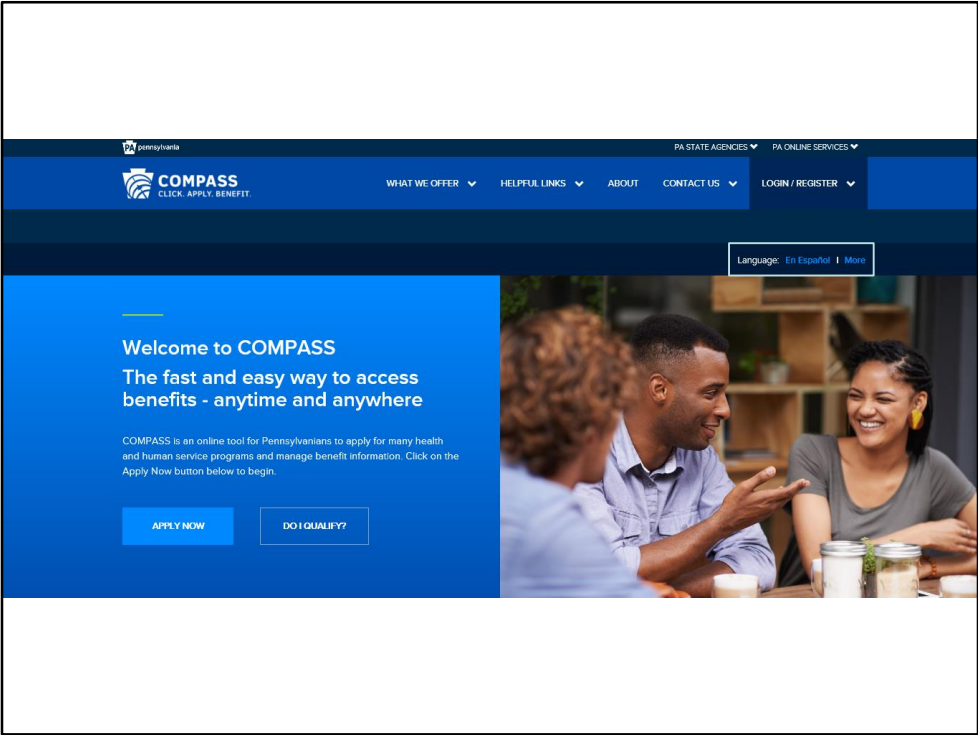


Contact Us gives you options for assistance, including the COMPASS Helpline phone number and access to request help through an online form.

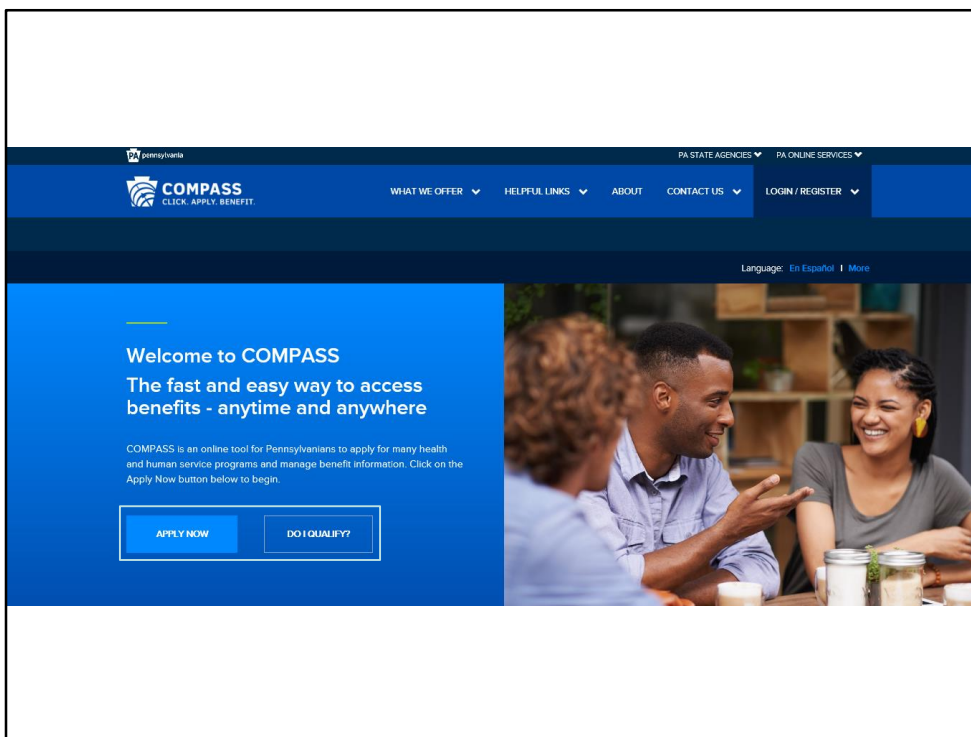




Login/Register allows you to register for a new account or log in to your existing account.

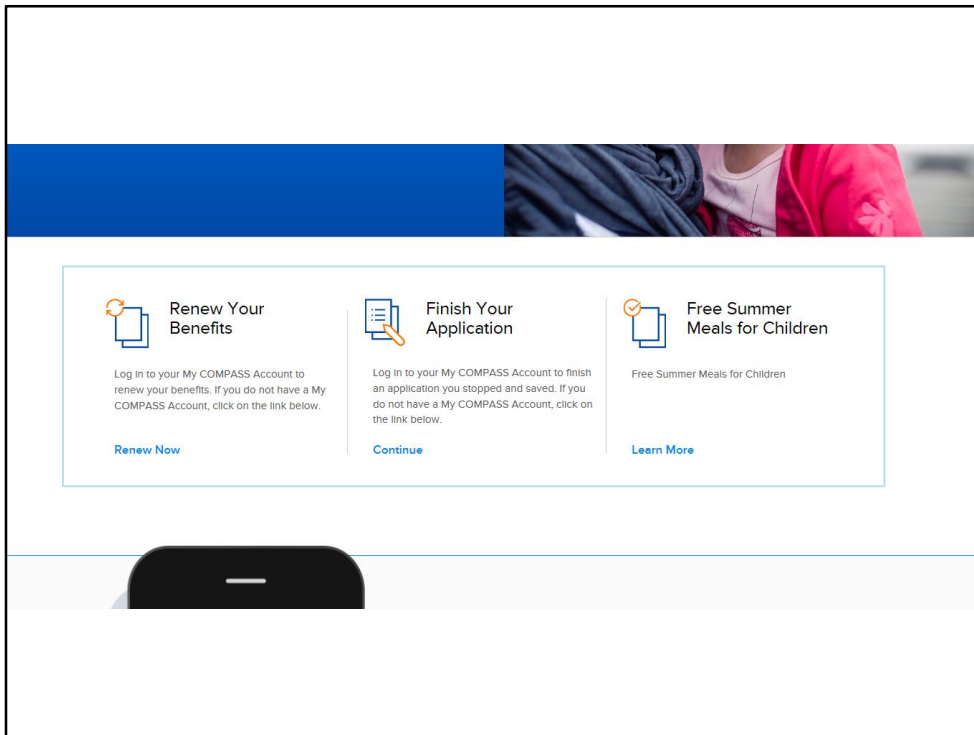


You can view this page in Spanish or access assistance with other languages.

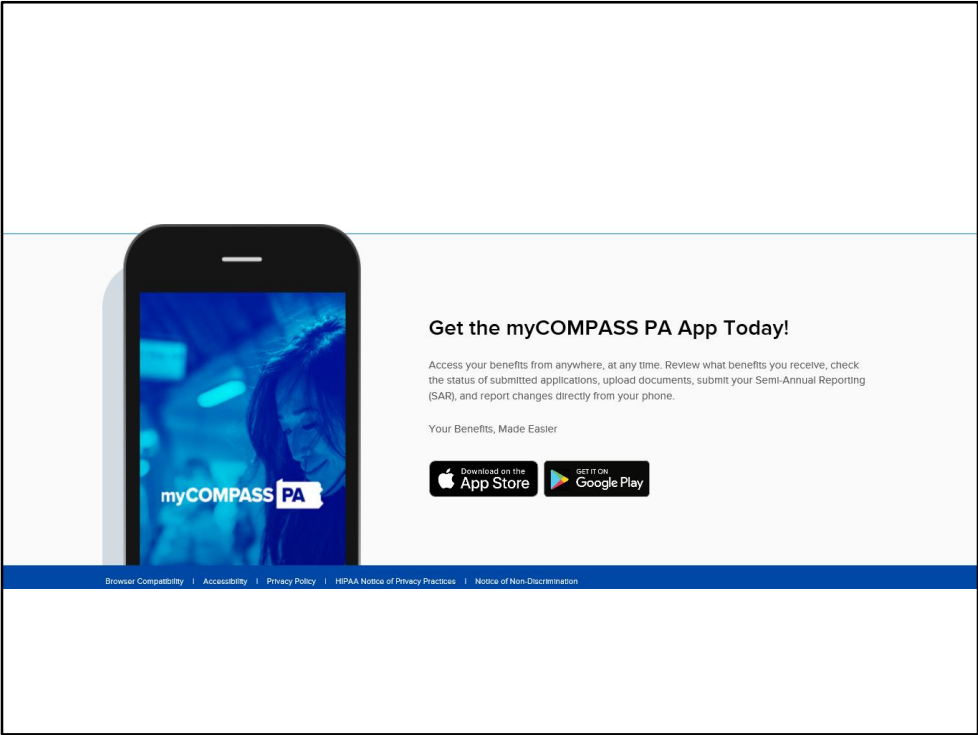


Individuals and families can Apply for new benefits or can check to see if they may qualify for benefits before applying.

Let's scroll down to see what else is on the COMPASS homepage.

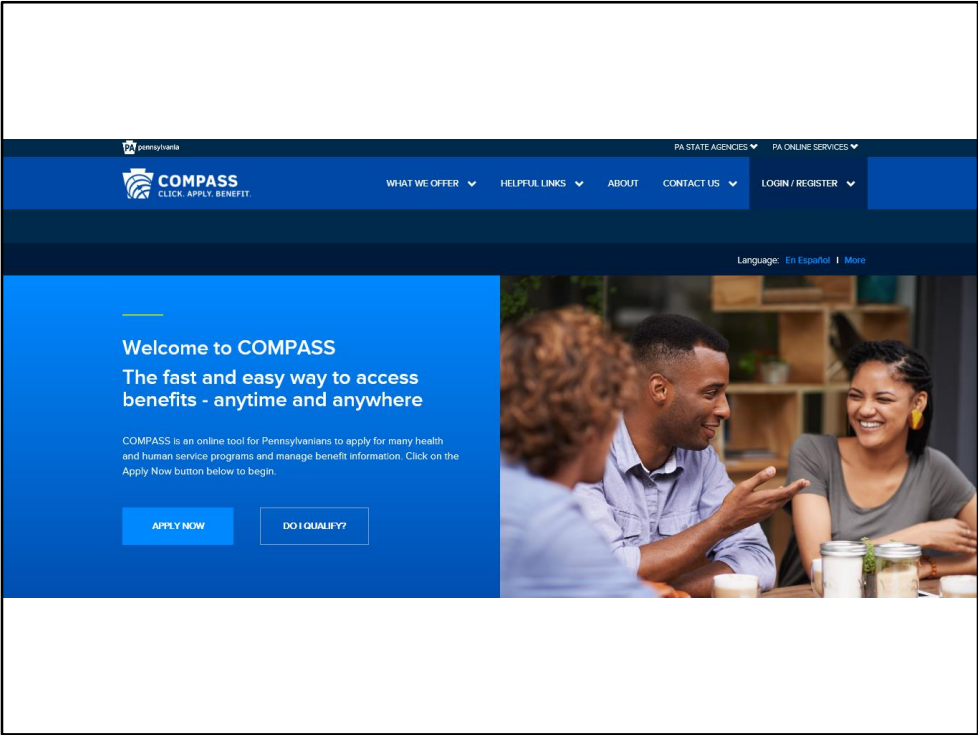


Here individuals and families may choose to renew benefits if they already have DHS benefits, finish an application that they have already started, or during LIHEAP season, apply for LIHEAP benefits. During the summer season, they may click the link to learn more about the Summer Food Service Program.




The advertisement features a smartphone on the left displaying the myCOMPASS PA app interface. To the right, the text reads: "Get the myCOMPASS PA App Today!". Below this, it states: "Access your benefits from anywhere, at any time. Review what benefits you receive, check the status of submitted applications, upload documents, submit your Semi-Annual Reporting (SAR), and report changes directly from your phone." Further down, it says "Your Benefits, Made Easier" and provides two download buttons: "Download on the App Store" and "GET IT ON Google Play". At the bottom of the advertisement, there is a blue bar with white text containing links: "Browser Compatibility | Accessibility | Privacy Policy | HIPAA Notice of Privacy Practices | Notice of Non-Discrimination".


And at the bottom of the page, there's information about the myCOMPASS PA app.



Now we'll take a closer look at some of things you, as a Community Partner, can do with COMPASS.

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 What is COMPASS

 Where and How to Access COMPASS

 Closer Look at the Community Partner Dashboard

Select the next topic you want to explore.

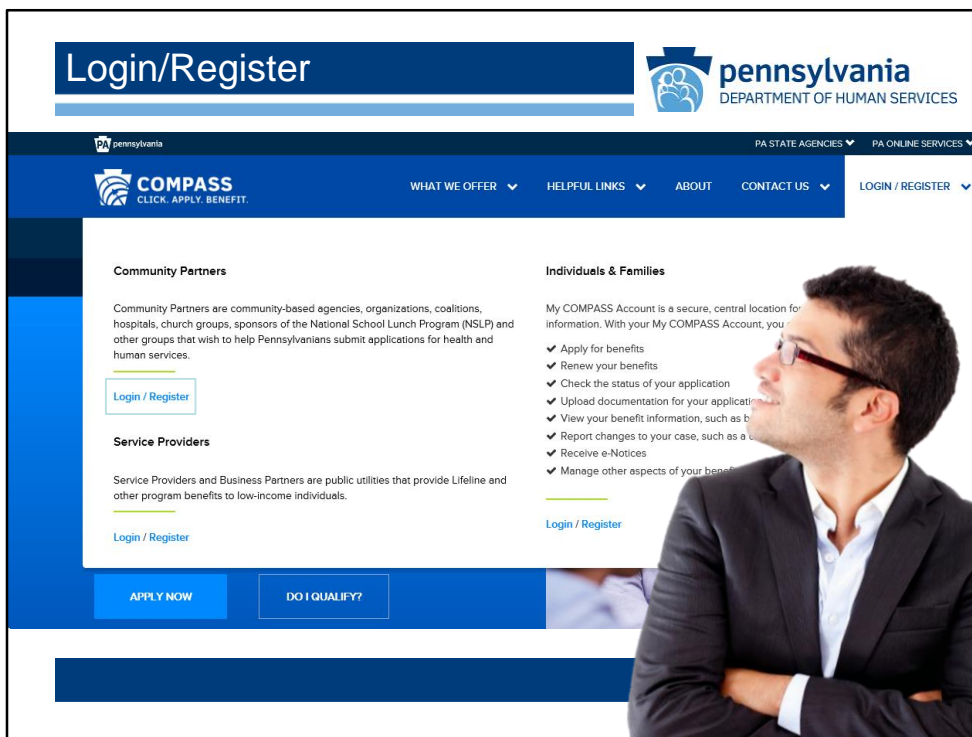


Organizations such as hospitals, coalitions, church groups, and other community based groups that help Pennsylvania residents apply for health and human services can register to become a COMPASS Community Partner.

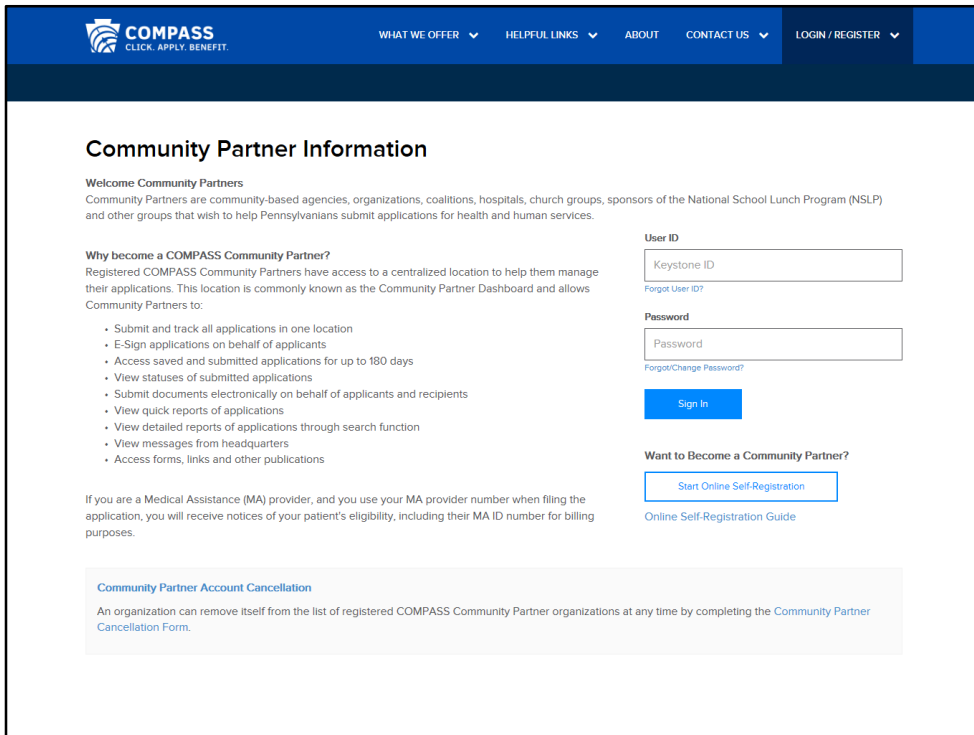




By registering as a COMPASS Community Partner, your organization can initiate and track applications and renewals, screen for benefits, submit documents, and more, through the COMPASS Community Partner Dashboard. Once registered, the COMPASS Community Partner Dashboard will serve as a single access point for all of your organization's activities.



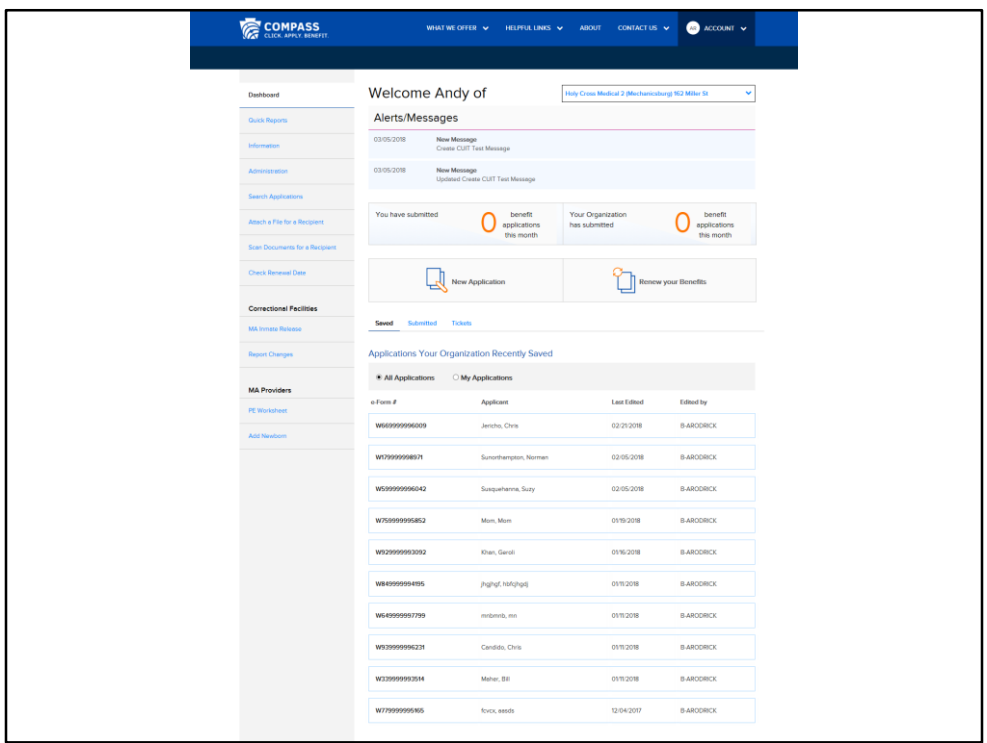
To log in or register as a Community Partner, click on the Login/Register link found in the Login/Register Menu.



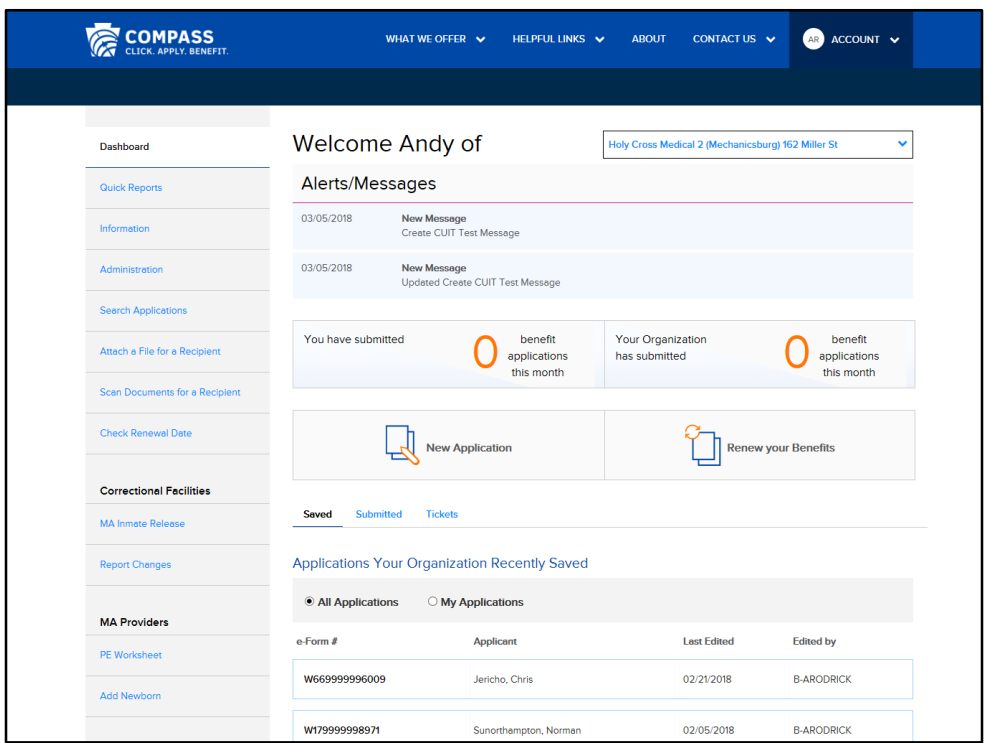
The “Online Self-Registration Guide” provides information on how to register your organization as a Community Partner. It also contains detailed information on other Administrative tasks, such as how to register your organization’s individual users.

To begin the registration process, click on the “Start Online Self-Registration” button.

Users with existing Community Partner credentials can sign in using their User ID and Password.



The first screen you see, your Community Partner Dashboard, shows a snapshot of your organizations' activities. There are many places you can go from here. Let's zoom in a bit and take a look around.



We'll look at the links along the left side of the screen after we look at the rest of the Dashboard elements.

The screenshot displays the COMPASS web application interface. At the top, there is a navigation bar with the COMPASS logo and the tagline "CLICK. APPLY. BENEFIT." followed by menu items: "WHAT WE OFFER", "HELPFUL LINKS", "ABOUT", "CONTACT US", and "ACCOUNT". The "ACCOUNT" menu is expanded, showing "Hi Andy, Holy Cross Medical 2" and links for "Dashboard", "Edit Profile", and "Logout".

The main content area is titled "Welcome Andy of Holy Cross Medical 2" and includes an "Alerts/Messages" section with two entries from 03/05/2018: "New Message: Create CUIT Test Message" and "New Message: Updated Create CUIT Test Message".

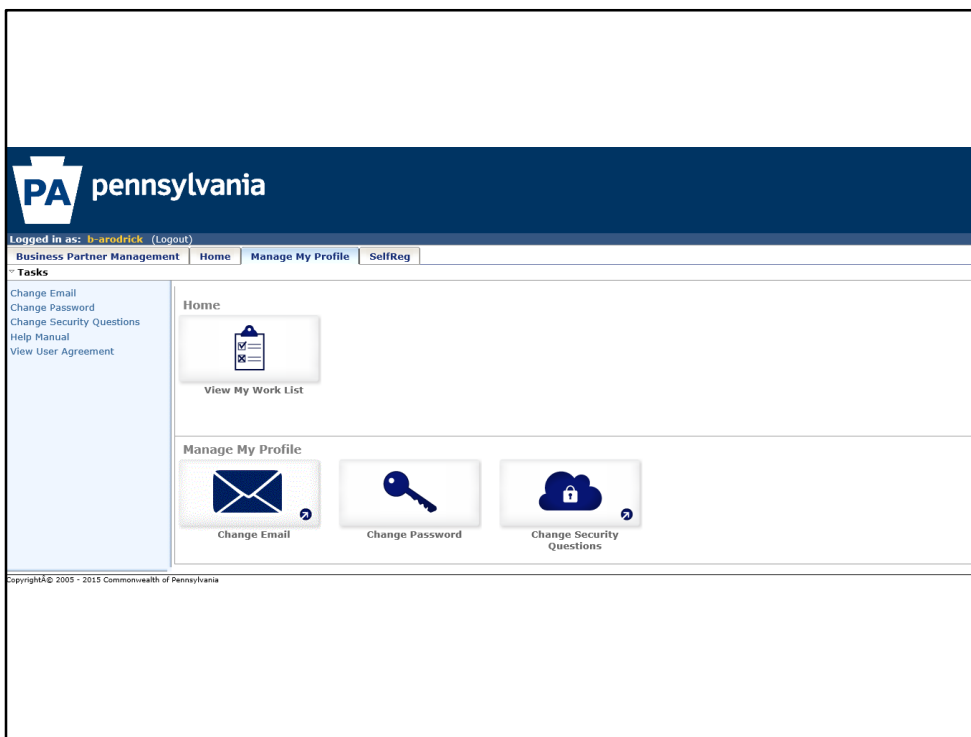
Below the alerts, there are two summary cards: "You have submitted 0 benefit applications this month" and "Your Organization has submitted 0 benefit applications this month".

There are two main action buttons: "New Application" and "Renew your Benefits".

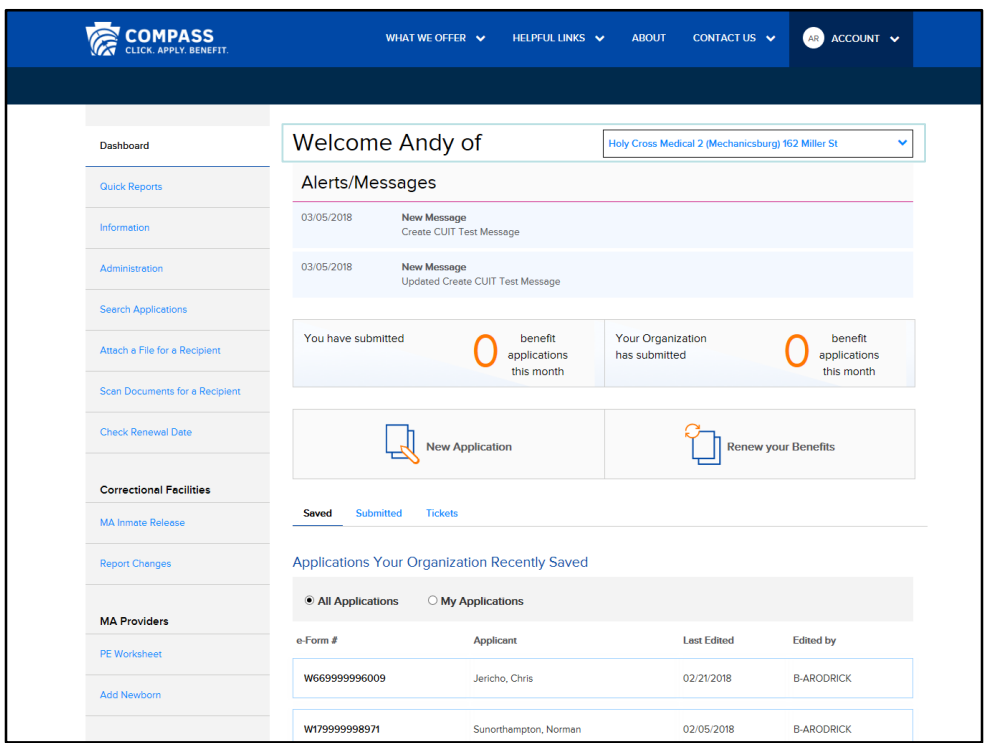
At the bottom, there is a section for "Applications Your Organization Recently Saved" with tabs for "Saved", "Submitted", and "Tickets". It includes radio buttons for "All Applications" (selected) and "My Applications". A table lists the following data:

e-Form #	Applicant	Last Edited	Edited by
W66999996009	Jericho, Chris	02/21/2018	B-ARODRICK
W17999998971	Sunorthampton, Norman	02/05/2018	B-ARODRICK

The Account tab in the top menu allows you to jump back to the Dashboard screen at any time, edit your profile, or log out. Let's see where the Edit Profile link takes us.

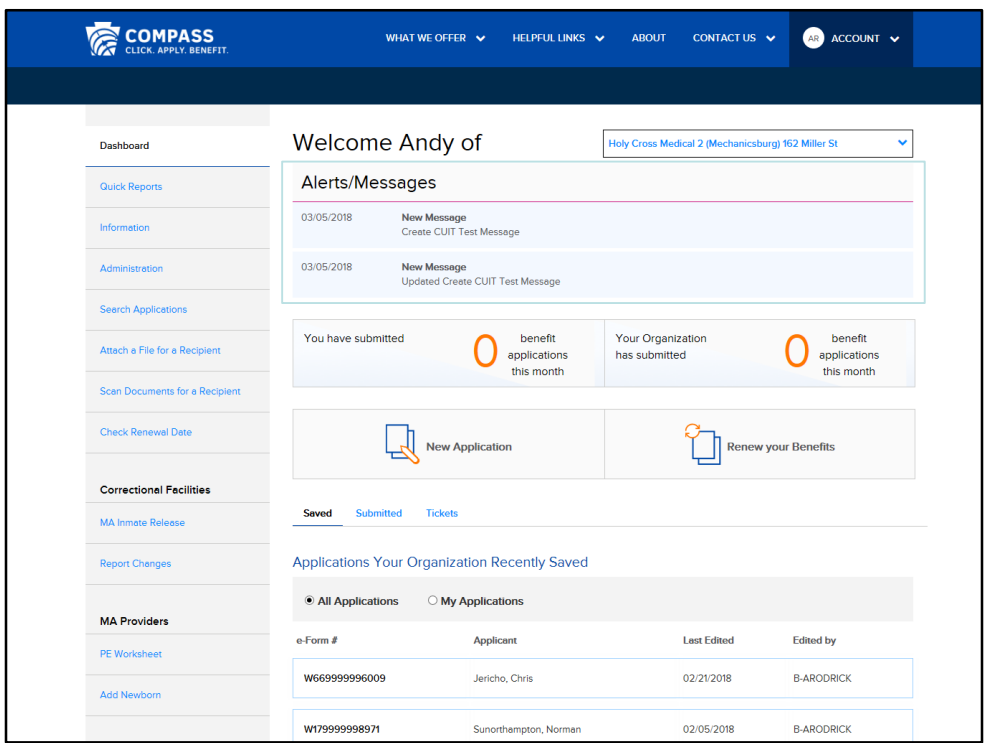


You can make changes to your profile on this screen, such as changing your email address, password, or security questions.



Your name and your Community Partner location will be populated near the top of the screen.





Just below, you will find important system notifications or messages.

The screenshot shows the COMPASS web application interface. The header includes the COMPASS logo and navigation links: WHAT WE OFFER, HELPFUL LINKS, ABOUT, CONTACT US, and ACCOUNT. The user is logged in as Andy of Holy Cross Medical 2 (Mechanicsburg) 162 Miller St.

**Alerts/Messages**

- 03/05/2018 **New Message**: Create CUIT Test Message
- 03/05/2018 **New Message**: Updated Create CUIT Test Message

**Submission Statistics**

- You have submitted 0 benefit applications this month
- Your Organization has submitted 0 benefit applications this month

**Actions**

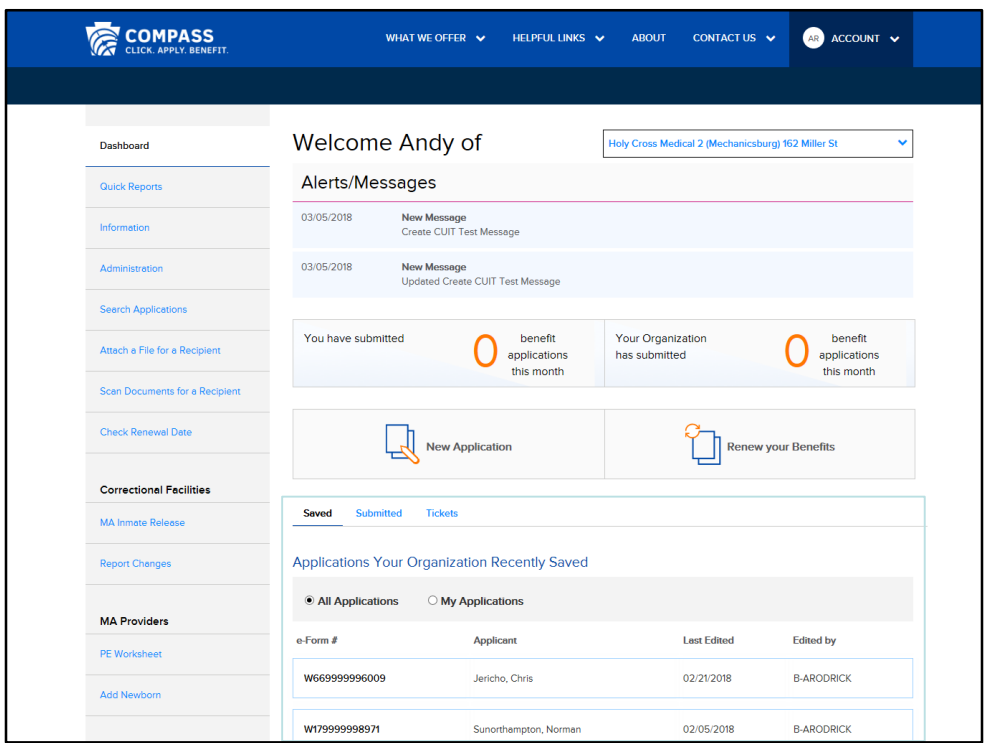
- New Application
- Renew your Benefits

**Applications Your Organization Recently Saved**

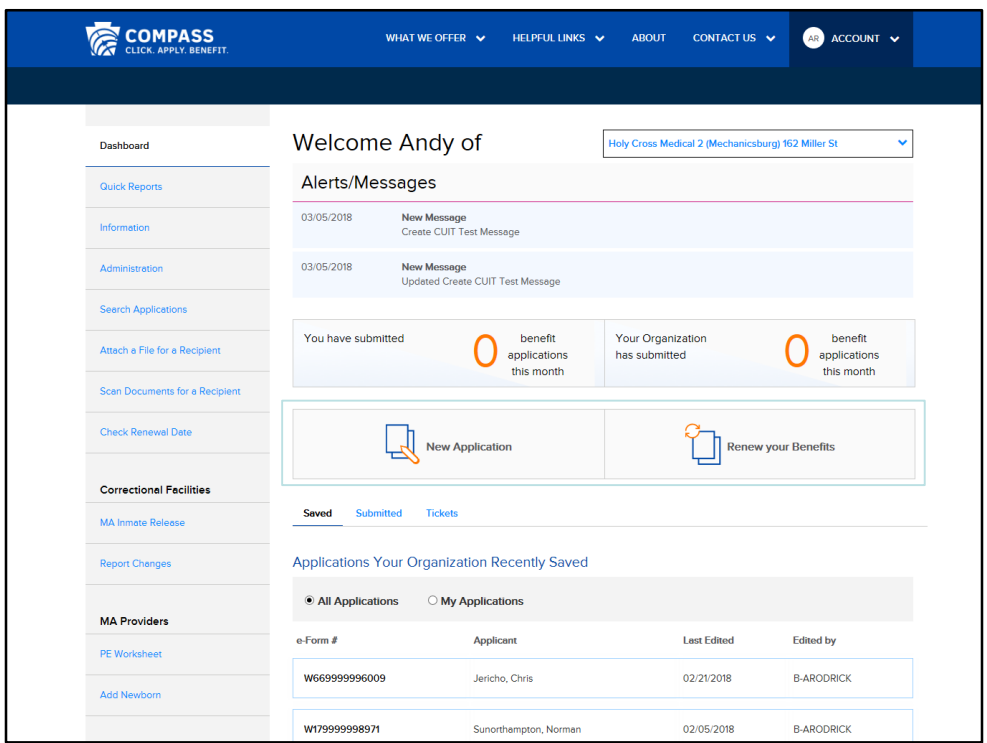
Filters:  All Applications  My Applications

e-Form #	Applicant	Last Edited	Edited by
W66999996009	Jericho, Chris	02/21/2018	B-ARODRICK
W17999998971	Sunorthampton, Norman	02/05/2018	B-ARODRICK

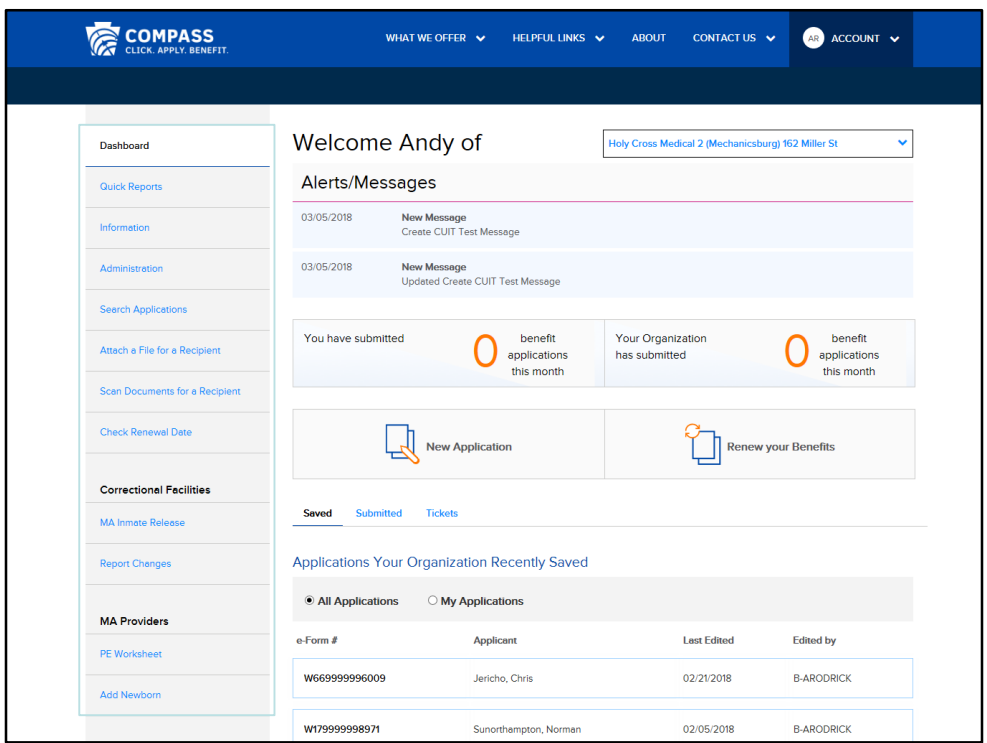
The rest of the page provides information about the applications you and your organization have saved and submitted. At a glance you can see how many applications you and your organization have submitted in the current month.



If you scroll lower, the bottom section shows recently saved and submitted applications by you and your organization.



In the middle of the screen there are quick links to jump to complete a new application or renew benefits.



Next, let's look at the links on the left.

The screenshot shows the COMPASS web application interface. The top navigation bar includes the COMPASS logo and menu items: WHAT WE OFFER, HELPFUL LINKS, ABOUT, CONTACT US, and ACCOUNT. The main content area is titled "Quick Reports" for the location "Holy Cross Medical 2 (Mechanicsburg)". It displays two summary tables for e-Forms submitted in March 2018.

**Submitted e-Forms by County**

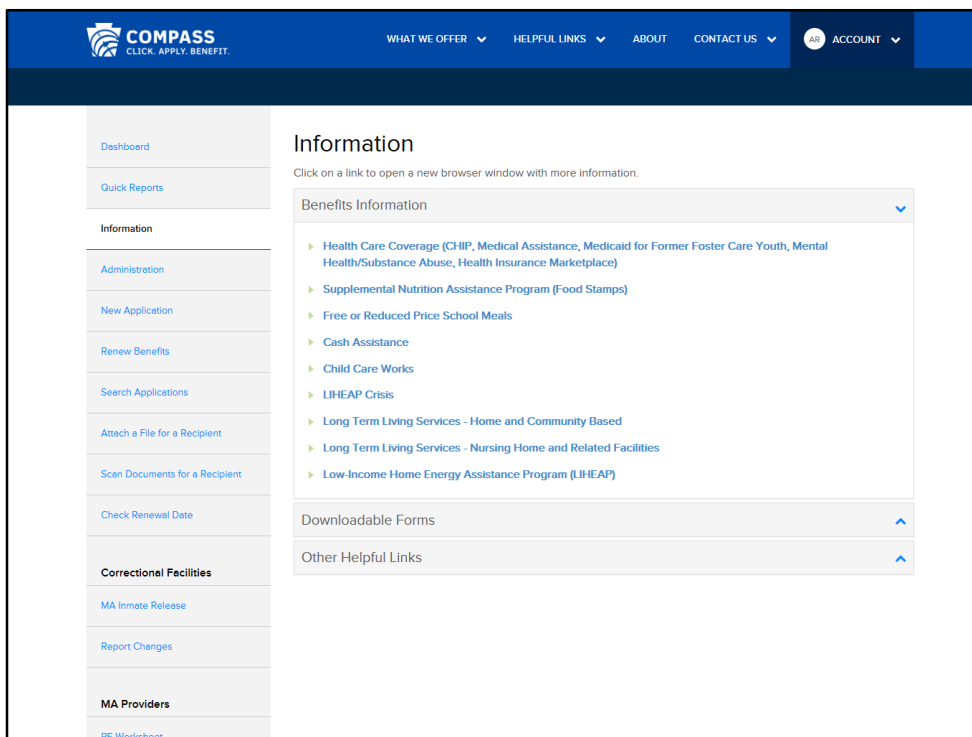
COUNTY	YOU	YOUR ORGANIZATION
<b>Total</b>	<b>0</b>	<b>0</b>

**Submitted e-Forms by Benefit**

BENEFIT	YOU	YOUR ORGANIZATION
<b>Total</b>	<b>0</b>	<b>0</b>

The left sidebar contains a navigation menu with categories: Quick Reports (Information, Administration, New Application, Renew Benefits, Search Applications, Attach a File for a Recipient, Scan Documents for a Recipient, Check Renewal Date), Correctional Facilities (MA Inmate Release, Report Changes), and MA Providers (PE Worksheet).

The Quick Reports screen shows the number of e-Forms submitted by you and your Organization.



The Information screen provides you with links to information about each of the benefits that you can apply for using COMPASS, links to downloadable forms, and other helpful links.

**COMPASS**  
CLICK. APPLY. BENEFIT.

WHAT WE OFFER | HELPFUL LINKS | ABOUT | CONTACT US | ACCOUNT

Location: Holy Cross Medical 2 (Mechanicsburg)

**Administrative Functions**

Click on a link below to access the administrative function.  
For more information on managing users and your organization/location, view the [Online Self-Registration Guide](#).

**Manage User**

Within this area you are able to manage your users' access to the COMPASS Dashboard and reset a user's password.

**Manage Organization**

Within this area you are able to manage organization location information to include address updates/changes, as well as review the Data Release Agreement.

**Work List**

Within this area you are able to view items that are on your work list, as well as search for previously submitted tasks.

**Registered Users**

Columns are sortable by ascending and descending order. Click on the column header once for ascending order and twice for descending order.

The following users are registered with your organization

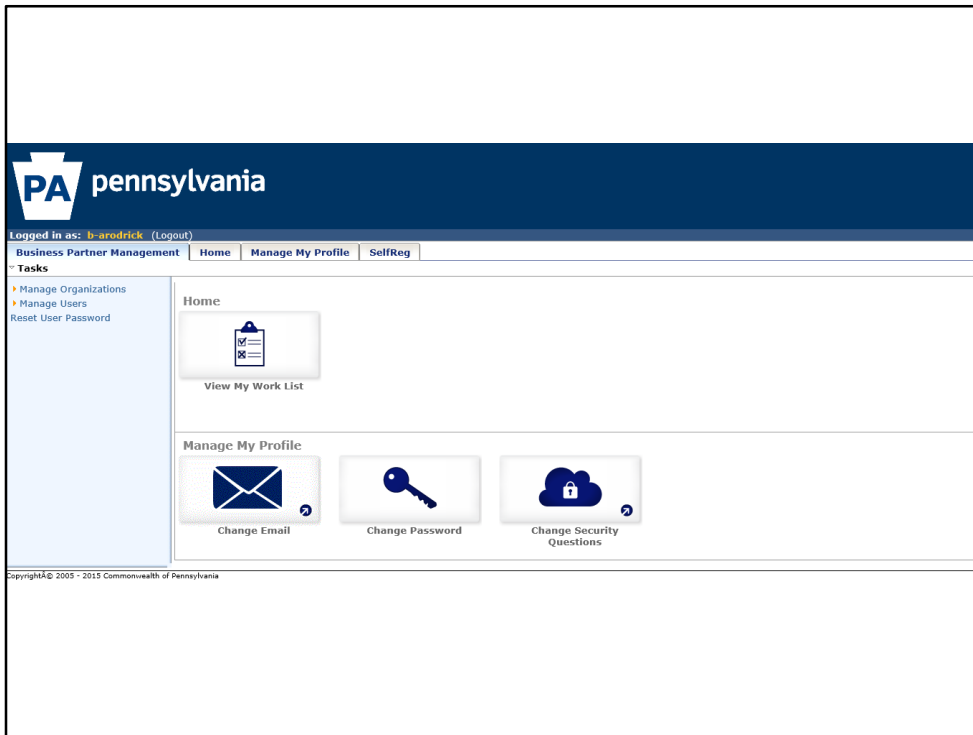
[Export To Excel](#) | [Export To Pdf](#)

USER ID	LAST NAME	FIRST NAME	EMAIL ADDRESS	PHONE NUMBER	DELEGATED ADMIN	ORGANIZATION
b-arodrick	Rodrick	Andy	c-milmbach@pa.gov	717-743-7062	Y	Holy Cross Medical 2 (Mechanicsburg)
b-dsagjdj	sagjdj	deglj	fxs@gmail.com	717-743-7062	Y	Holy Cross Medical 2 (Mechanicsburg)
b-jkala	kala	Jam	lak.krr@gmail.com	465-665-7658	Y	Holy Cross Medical 2 (Mechanicsburg)
b-troman	roman	Tiffany	elijawale173@gmail.com	717-555-5555	Y	Holy Cross Medical 2

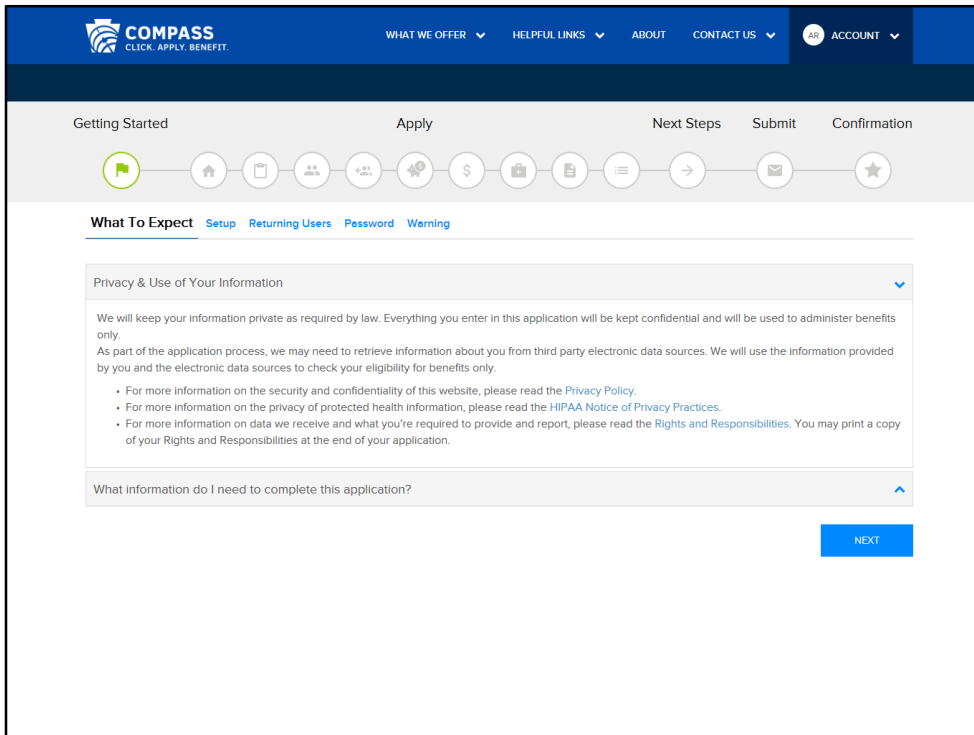
The Administrative Functions Screen provides links to the administrative functions menu, where you can make changes to your Community Partner Organization and users. A list of your organization’s users appears here. The list can be exported for saving and sorting.

Let’s see where the “Manage User” and “Manage Organization” links take us.





This is where you can make changes to your organization and manage your organization's users. For detailed instructions on how to manage your Community Partner Profile or Community Partner Users, please refer to the COMPASS Community Partner Online Self-Registration Quick Reference Guide.



The “New Application” link brings you this screen, where you can complete an application on behalf of your client. You will need to complete the entire application in order to submit it. If you are unable to complete the application, you may save it and return to it later.

For a more in depth review of how to complete an application, please view the COMPASS Overview for Individuals and Families. Otherwise, follow the instructions on screen and use the Help icons for further assistance.

**COMPASS**  
CLICK. APPLY. BENEFIT.

WHAT WE OFFER ▾ HELPFUL LINKS ▾ ABOUT CONTACT US ▾ ACCOUNT ▾

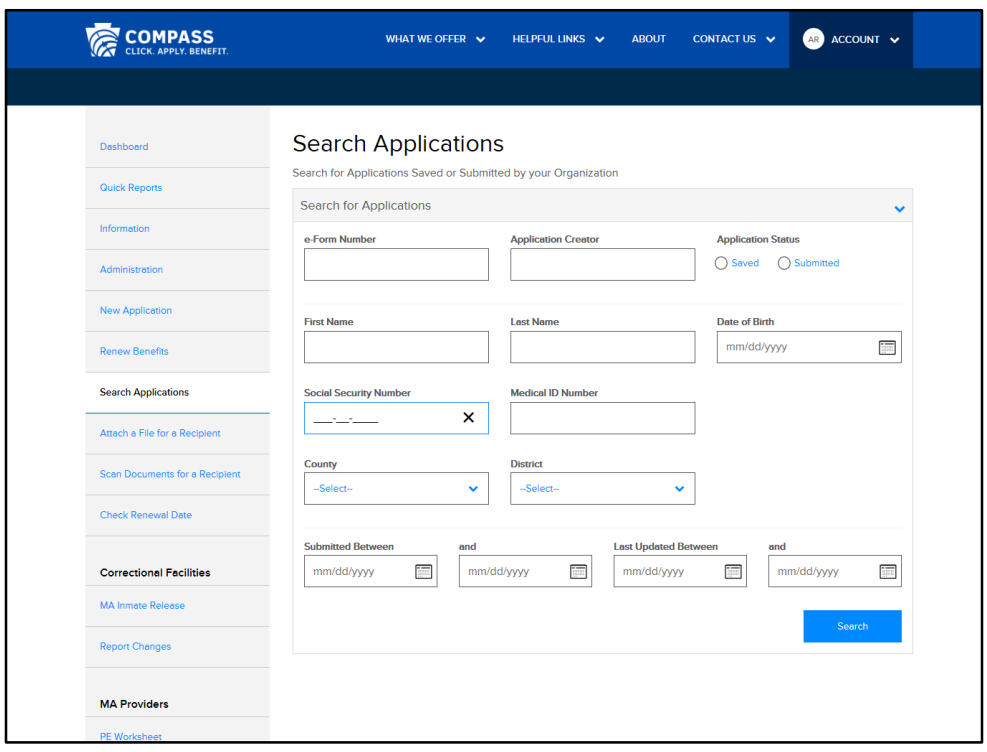
## Renew Your Benefits

You may only renew benefits for one Department at a time. Please select the benefit(s) you would like to renew.

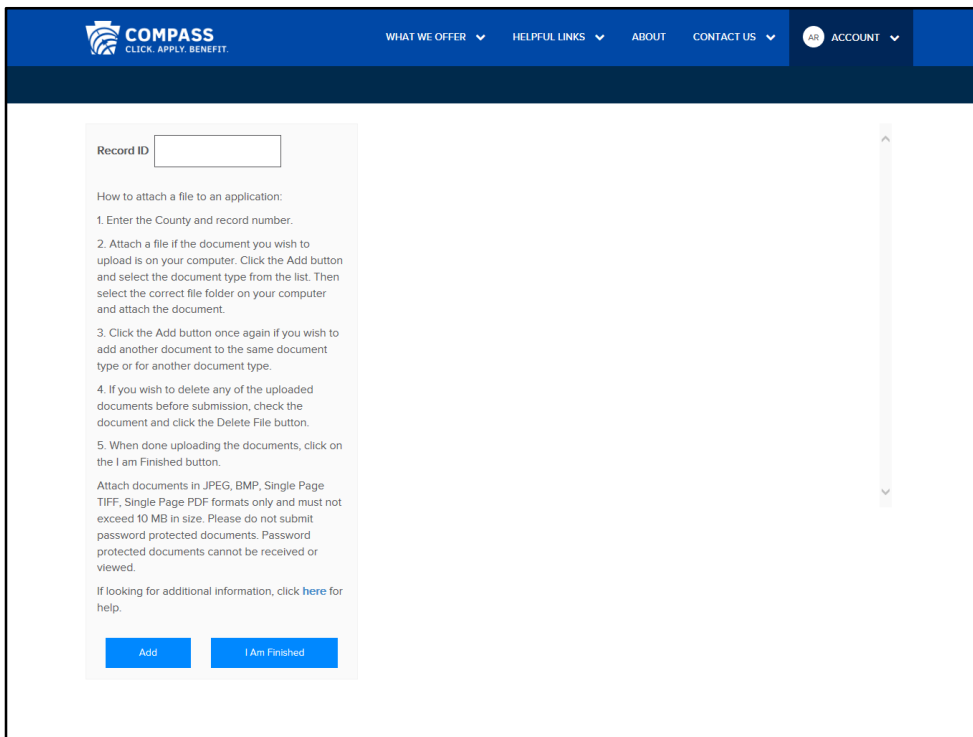
- Department of Human Services Benefit(s): Medical Assistance, Supplemental Nutrition Assistance Program (Food Stamps) Benefits, Cash Assistance, Home and Community Based Services Waiver, or Long Term Living Services - Nursing Home and Related Facilities
- Department of Human Services Benefit: Children's Health Insurance Program (CHIP)
- Community Partners are able to renew benefits on behalf of a citizen, given they have received approval from the citizen to renew on their behalf. Please indicate that you have received permission to submit this renewal on behalf of the individuals on the case.

[Back to CPD Home](#) [Sign In](#)

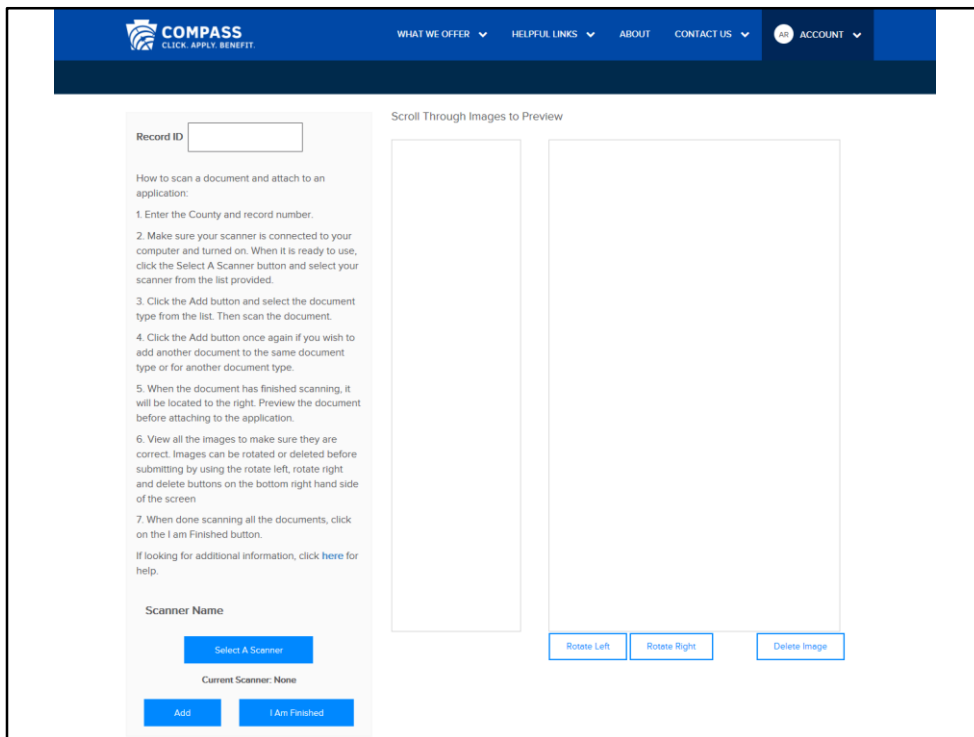
The “Renew Benefits” link brings you to this screen, where you may assist your clients with existing cases in renewing their benefits.



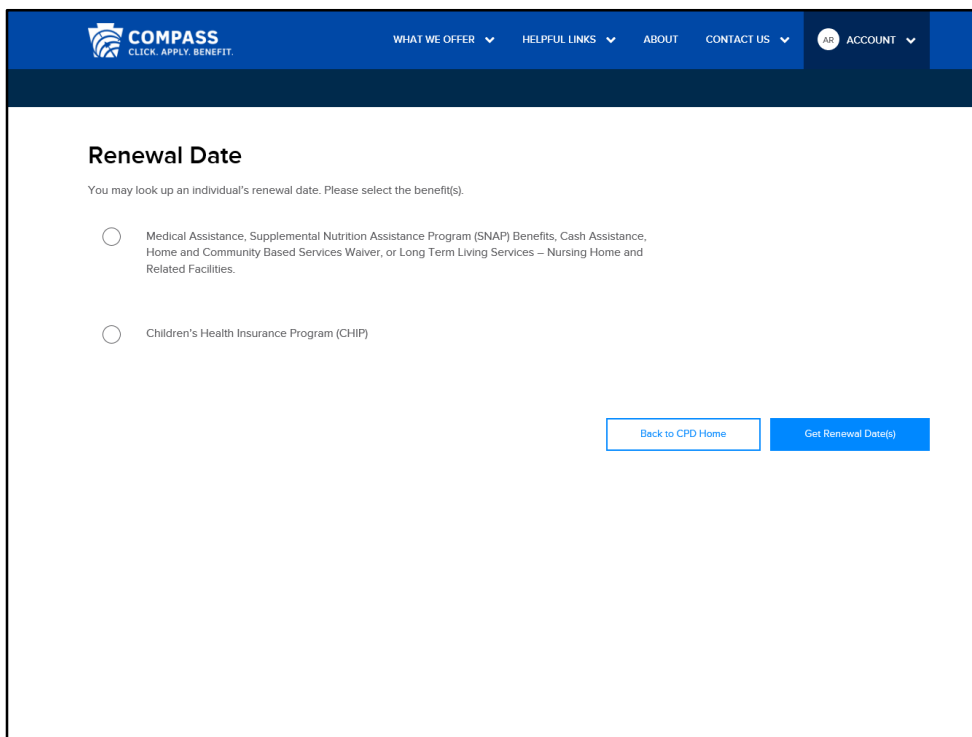
The Search Applications screen allows you to search for applications your organization has saved or submitted.



The “Attach a File for a Recipient” link brings you to this screen, where you may attach a file to be submitted to a case. Follow the instructions on the screen to attach your document.



The “Scan Documents for a Recipient” link brings you to this screen, where you may scan documents to be submitted with a case. Follow the instructions on the screen to scan documents.



The “Check Renewal Date” link brings you to this screen, where you can find out the renewal date for individuals’ benefits.

**Renewal Date**

You may look up an individual's renewal date. Please select the benefit(s).

- Medical Assistance, Supplemental Nutrition Assistance Program (SNAP) Benefits, Cash Assistance, Home and Community Based Services Waiver, or Long Term Living Services – Nursing Home and Related Facilities.
- Children's Health Insurance Program (CHIP)

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**County Assistance Office Benefit Renewal Search**

To look up an individual's renewal date, please enter identifying information.

Please select one of the radio button options and enter the Head of the Household MCI number / Medicaid ID / EBT Card number for this field, or the Head of the Household SSN. Then, enter the County/Case Record Number.

**Social Security Number \***  (example: 123-45-6789)

**MCI # / Medicaid ID / EBT Card # \***

**County \***

**Case Record \***  (example: 51 - Philadelphia / 3456789)

You will need to provide demographic or case information.



The screenshot shows the COMPASS web application interface. The top navigation bar includes the COMPASS logo and the tagline 'CLICK. APPLY. BENEFIT.', along with menu items: WHAT WE OFFER, HELPFUL LINKS, ABOUT, CONTACT US, and ACCOUNT. A left sidebar contains a navigation menu with items: Dashboard, Quick Reports, Information, Administration, New Application, Renew Benefits, Search Applications, Attach a File for a Recipient, Scan Documents for a Recipient, Check Renewal Date, Correctional Facilities, MA Inmate Release, Report Changes, MA Providers, and PE Worksheet. The main content area is titled 'Apply for Inmate Release Health Care Coverage' and includes a sub-header 'What is Apply for Inmate Release Health Care Coverage?'. Below this is a descriptive paragraph: 'The Apply for Inmate Release Health Care Coverage feature allows approved correctional facilities with the Department of Human Services (e.g., State Correctional Institutions, County Prisons, and Community Corrections Centers) to submit a shortened Health Care Coverage application for individuals who are being released from incarceration so the individuals have health insurance in place when they re-enter the community.' The form fields are: Non-MA Provider Number (AT234567) with a red asterisk and a help icon; Release Date with a red asterisk, a date format hint 'mm/dd/yyyy', and a help icon; Release Address with a help icon; Street Address with a red asterisk; Street Address (2); City with a red asterisk; State with a red asterisk and a dropdown menu currently showing 'PENNSYLVANIA'; Zip with a red asterisk; Zip Ext; and County with a red asterisk.

The MA Inmate Release Screen allows approved correctional facilities to submit a shortened Health Care application for individuals who are being released from incarceration.

**COMPASS**  
CLICK. APPLY. BENEFIT.

WHAT WE OFFER ▾ HELPFUL LINKS ▾ ABOUT CONTACT US ▾ ACCOUNT ▾

Dashboard  
Quick Reports  
Information  
Administration  
New Application  
Renew Benefits  
Search Applications  
Attach a File for a Recipient  
Scan Documents for a Recipient  
Check Renewal Date

**Correctional Facilities**  
MA Inmate Release

Report Changes

MA Providers  
[PE Worksheet](#)

### Search for an Individual to Report a Change

**What is Report Change ?**

The Report Change feature allows approved correctional facilities with the Department of Human Services (e.g., State Correctional Institutions, County Prisons, and Community Corrections Centers) to submit release address and/or release date updates for individuals being released from incarceration. This feature also allows approved correctional facilities to submit a Release Cancellation if the incarcerated individual is no longer being released.

Please enter your organization's Non-MA Provider Number and the individual's e-Form Number below and click 'Search'. Once you locate the correct individual, click on 'Report Change' to submit a change to the individual's release address and/or release date or to submit a release cancellation.

Non-MA Provider Number (A1234567) \*

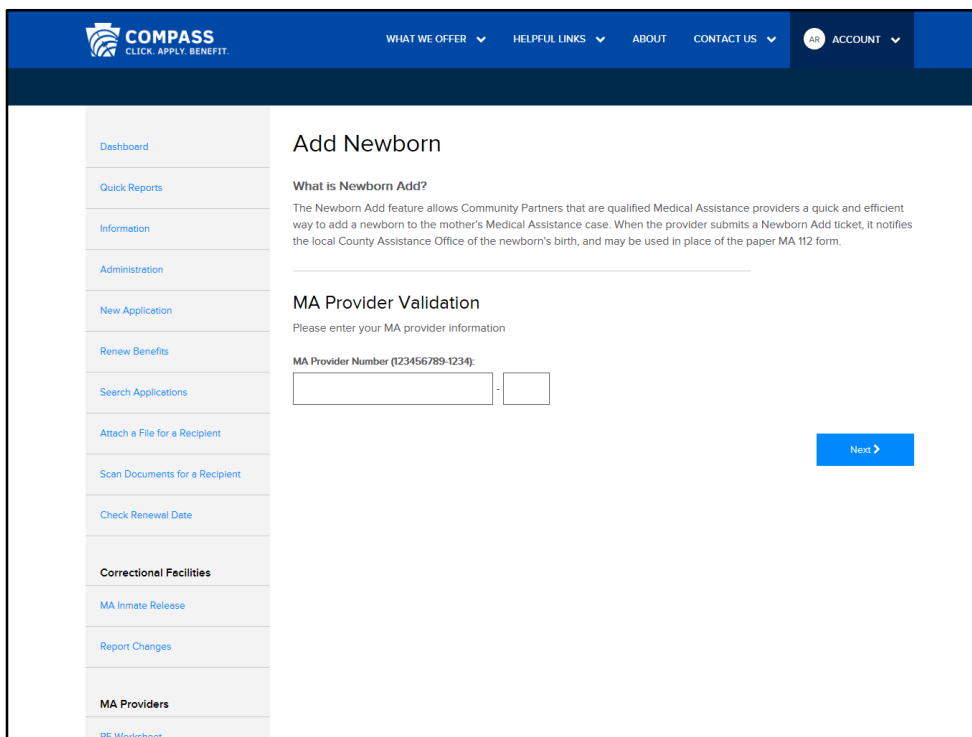
e-Form Number \*

Clear Search

The Report Changes screen allows approved correctional facilities to report address and/or release date updates for individuals being released from incarceration. Facilities may also submit a release cancellation if the individual is no longer being released.

The screenshot shows the COMPASS web application interface. The top navigation bar is blue with the COMPASS logo and the tagline 'CLICK. APPLY. BENEFIT.' on the left, and menu items 'WHAT WE OFFER', 'HELPFUL LINKS', 'ABOUT', 'CONTACT US', and 'ACCOUNT' on the right. A left sidebar contains a list of navigation options: Dashboard, Quick Reports, Information, Administration, New Application, Renew Benefits, Search Applications, Attach a File for a Recipient, Scan Documents for a Recipient, Check Renewal Date, Correctional Facilities, MA Inmate Release, Report Changes, and MA Providers. The main content area is titled 'Apply for Presumptive Eligibility' and includes a section 'What is Presumptive Eligibility?' with explanatory text. Below this is the 'MA Provider Validation' section, which asks for MA provider information. It features a dropdown menu for 'Type of Medical Service' (currently showing '--Select--'), and a field for 'MA Provider Number (123456789-1234)' with a hyphen separator and a second input field. A blue 'Next >' button is located at the bottom right of the form area. At the bottom left of the page, there is a link for 'PE Worksheet'.

Certain approved MA providers may complete Presumptive Eligibility applications through this screen for qualified Presumptive Eligibility groups (including pregnant women, children, parents/caretakers, adults ages 19-64, and former foster care recipients under age 26).



Qualified MA providers may notify the County Assistance Office of a newborn's birth using the Add Newborn screen, which may be used in place of the paper MA112 form.

The screenshot displays the COMPASS web application interface. At the top, the COMPASS logo is visible with the tagline "CLICK. APPLY. BENEFIT." and navigation links for "WHAT WE OFFER", "HELPFUL LINKS", "ABOUT", "CONTACT US", and "ACCOUNT". The user is logged in as "Welcome Andy of" and is associated with "Holy Cross Medical 2 (Mechanicsburg) 162 Miller St".

The dashboard includes a sidebar with navigation options: Dashboard, Quick Reports, Information, Administration, Search Applications, Attach a File for a Recipient, Scan Documents for a Recipient, Check Renewal Date, Correctional Facilities, MA Inmate Release, Report Changes, MA Providers, PE Worksheet, and Add Newborn.

The main content area features an "Alerts/Messages" section with two notifications dated 03/05/2018 regarding "New Message" for creating and updating CUIT Test Messages. Below this, two summary cards show that both the user and the organization have submitted 0 benefit applications this month. Action buttons for "New Application" and "Renew your Benefits" are provided.

A section titled "Applications Your Organization Recently Saved" includes a filter for "All Applications" (selected) and "My Applications". A table lists the following data:

e-Form #	Applicant	Last Edited	Edited by
W66999996009	Jericho, Chris	02/21/2018	B-ARODRICK
W17999998971	Sunorthampton, Norman	02/05/2018	B-ARODRICK

If you have further questions about the COMPASS experience for applicants or recipients, we encourage you to view the COMPASS Overview for Individual and Families, which can be found in the Helpful Links Section of COMPASS.

For Further Assistance:

pennsylvania  
DEPARTMENT OF HUMAN SERVICES

COMPASS Helpline:  
1-800-692-7462

or

[www.dhs.pa.gov/Feedback/index.htm](http://www.dhs.pa.gov/Feedback/index.htm)

For further assistance using COMPASS, remember that you may access help for a field by clicking on the blue question mark icon next to it. You may also contact the COMPASS helpline at: 1-800-692-7462 or send an email at [www.dhs.pa.gov/Feedback/index.htm](http://www.dhs.pa.gov/Feedback/index.htm).



Thank you for taking the time to view the Community Partner COMPASS Overview.