# How to end a role satisfactorily or unsatisfactorily: Video Transcript

We’re going to look at how to close a Member’s role, recording it as either satisfactory or unsatisfactory.

Do not use this method if ending a role for someone who has died as this will send an email which may be upsetting to the family. Guidance on what to do in this situation can be found on the Compass support site.

You will need to know details of the Member whose role you want to end before attempting this process.

First login and you’ll be taken to your Compass homepage.

Make sure that you have selected the right role to complete this task from the ‘My Roles’ bar at the top of the page.

Start by searching for the Member. You can do this using their membership number or, if you don’t know this, use the basic or advanced search options. More guidance can be found on the Compass support site.

You will be taken to the Member’s record.

Click on the ‘Roles’ at the top of the page.

Click on the ‘End’ button to the right of the role you want to close.

A popup box will appear titled ‘End Adult Role’ with options to end role(s) satisfactorily or unsatisfactorily.

First we’re going to look at how to end a Member’s role satisfactorily. We will look at how to end a role unsatisfactorily afterwards, but the process to get to this point is the same.

Click the ‘End Role(s) Satisfactorily’ button.

Enter the end date for the role by typing it directly or selecting it using the calendar icon. Select the reason for ending the role using the dropdown box.

Both of these fields are mandatory.

Use the ‘Reason Free Text’ box to enter any additional, factual details you want to be recorded. If you choose ‘Other Reason’ from the dropdown box, make sure you write the details here.

The second half of the window will display the role/roles being ended.

When you have entered all the details click ‘Next’.

The next button will change to an ‘End Role’ button.

Check the information carefully, and when you are happy click ‘End Role’.

This will end the role.

An email will be sent to the Member to advise that the role has been closed.

If the Member has other active role, you will be taken back to the Member’s role page. The role you closed will now be displayed on the list as closed.

Alternatively, if the Member has no other active roles, you will see a pop up saying ‘this role has now been closed’.

We’re now going to look at how to end a role unsatisfactorily.

The beginning of the process is the same as for a satisfactory process. Search for the Member, go to the ‘Roles’ page of the record and click on ‘End’.

From the options in the popup box, select ‘End role(s) unsatisfactorily’.

Enter the end date for the role by typing it directly or selecting it using the calendar icon.

Select the reason for ending the role using the dropdown box. Both of these fields are mandatory.

Use the ‘Reason Free Text’ box to enter any additional details that you want to be recorded. This field is mandatory here, and must be completed when closing a role unsatisfactorily.

The second half of the window will display the roles which are being ended.

When you have entered all the details click ‘Next’.

The next button will change to an ‘End Role’ button.

Check the information carefully, and when you are happy click ‘End Role’.

This will end the role.

It’s important to ensure that the appropriate communication about this change is carried out locally; with the individual themselves and any other relevant Members, such as their line manager.

The Member won’t receive an email or alert through Compass to notify them of this role closure.

You will be taken back to the Member’s role page and the role you closed will now be displayed on the list as closed.

If you have entered an end date in the future, the role will remain as full with ‘Ending date’ in brackets.

If the member has no other active roles, you will see a pop up saying ‘this role has now been closed’

This concludes the video on ending roles. Further guidance can be found on the Compass support site.