How to amend, create and view a provider

In this guide you will find out how to do the following:
- Amend a provider record
- Create a provider
- View a provider record

Amending a provider record

Step 1: Log into Compass and click onto the **'Provider'** folder on the **'Homepage Menu'** then click on **'Provider & User Update'**.
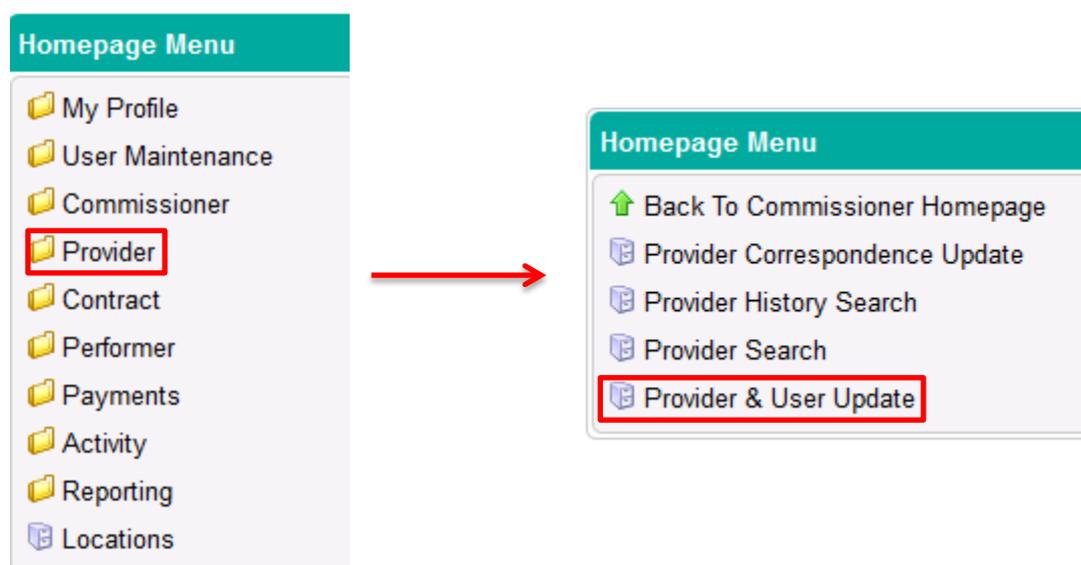
Step 2: You will then be presented with a list of all providers. You can use the **drop down menu** to refine your search. Once you have located the provider record you wish to amend click on the **'Edit'** button.

Step 3: You will then be presented with the below screen.
The **'General'** gives an overview of the Provider record.

*Please note: you cannot amend the **'Provider Type'** after the Provider ID has been created.*

Step 4: Click on the **'Participant's'** tab to view the current listed participants on the contract.

Step 5: You can use the **'Edit'** button to change the details of an existing participant or the **'Create'** button to add a new participant to the Provider ID.
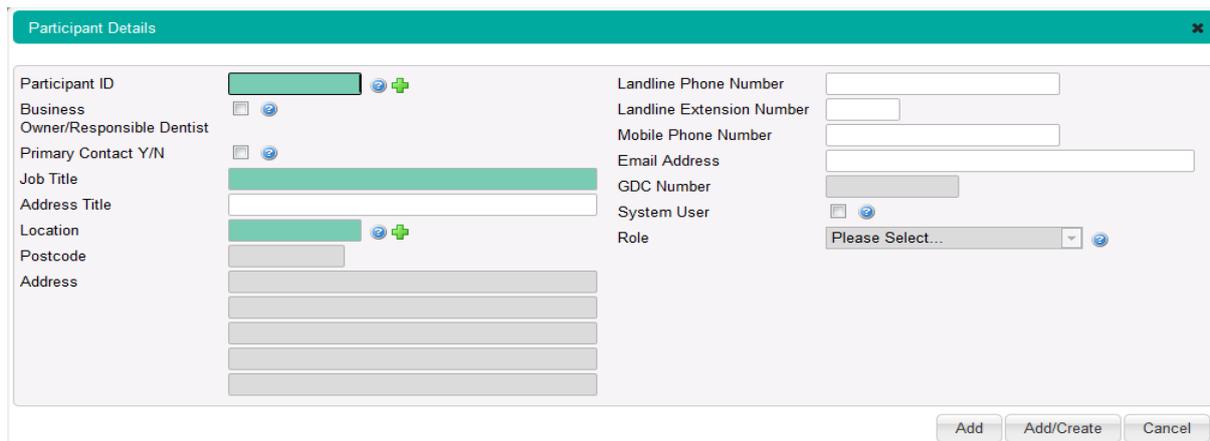
If the person you are looking to attach to the Provider record already has a Participant ID or has a performer number you can enter this in the **'Participant ID'** box to populate the user details.

To create a new Participant ID, click on the **green plus** next to the **'Participant ID'**

Once you have completed the amendments, click **'Save'** on the main **'Provider & User Update' screen** to complete the process.

Creating a Provider

Step 1: Log into Compass and click onto the **'Provider'** folder **'Homepage Menu'** and then click on **'Provider & User Update'**.

Step 2: Click on **'Create'.**

Step 3: Complete all of the mandatory fields highlighted in green.

*Please note: you cannot amend the **'Provider Type'** after the Provider ID has been created.*

Once completed, click on the 'Participants' tab.

Step 4: Click on the **'Create'** button to add new participants to the Provider ID.

If the person you are looking to attach to the Provider record already has a Participant ID or has a performer number you can enter this in the **'Participant ID'** box to populate the user details.

To create a new Participant ID, click on the **green plus** next to the **'Participant ID'**

Once you have completed all mandatory fields listed in green, click **'Add'** to add the user to the Provider record and then click **'Save'** on the main Provider & User Update screen to complete the process.

Tip: You must have at least one participant as a business owner/responsible dentist. There must also be one dentist

Viewing a 'Provider' record

Step 1: Log into Compass and click onto the **'Provider'** option on the **'Homepage Menu'** and then click on **'Provider Search'**.
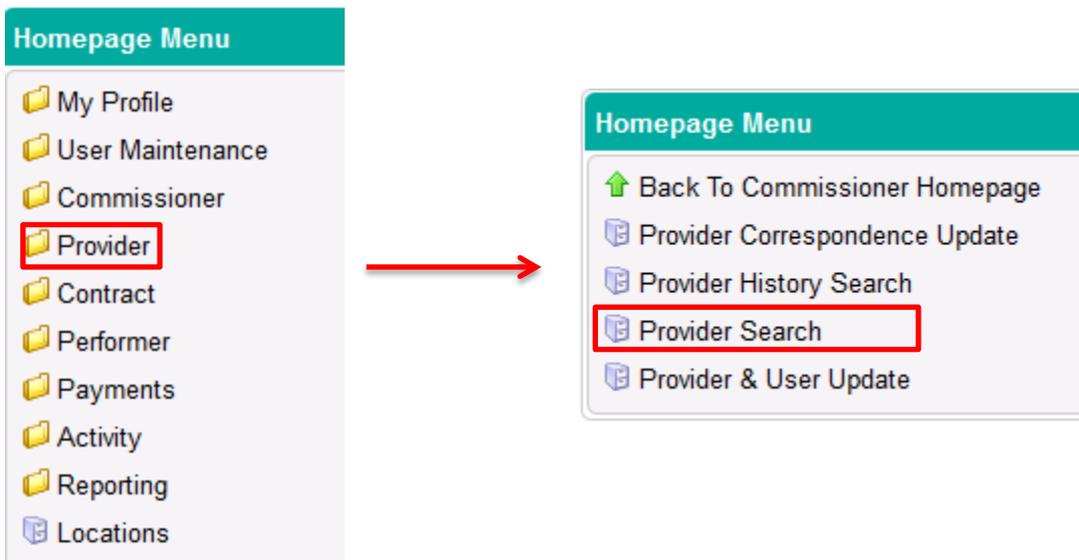
Step 2: Search for the provider you wish to view

2. Enter the relevant health body code

1. Select the type of provider by using the drop down list.

3. Click search

Step 3: You will be presented with a list of providers. Click the **'Details'** button in the **'Action'** column to view the provider information.

Provider & User Update	✖

Provider ID [   ]

General | Participants

Provider Type	Please Select... ▼	Postcode	[ ]
Location	[ ] ❓ ➕	Address	[ ]
Provider/Company Name	[ ]		[ ]
Company Registration Number	[ ]		[ ]
Website	[ ]		[ ]
Bank Account Name	[ ]	Description	
Bank Sort Code	[ ]		
Bank Account	[ ]		
Automatic Debt Recovery	☑		
Building Society Ref Number	[ ]		
Effective From Date	[ ] 📅		
Effective To Date	[ ] 📅		
Correspondence Type	Electronic ▼		

Save   Save/Create   Cancel