

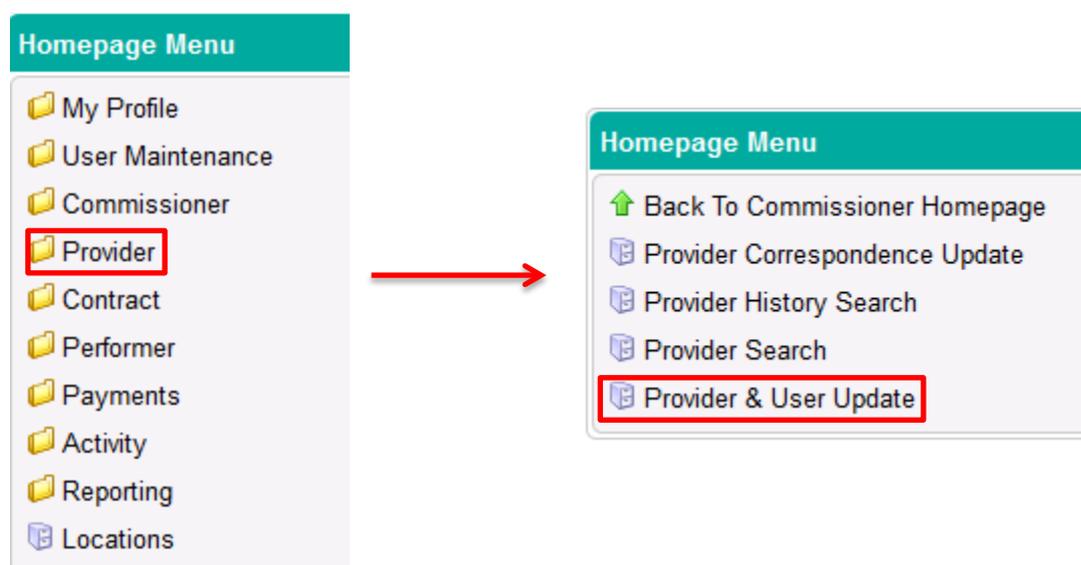
## How to amend, create and view a provider

In this guide you will find out how to do the following:

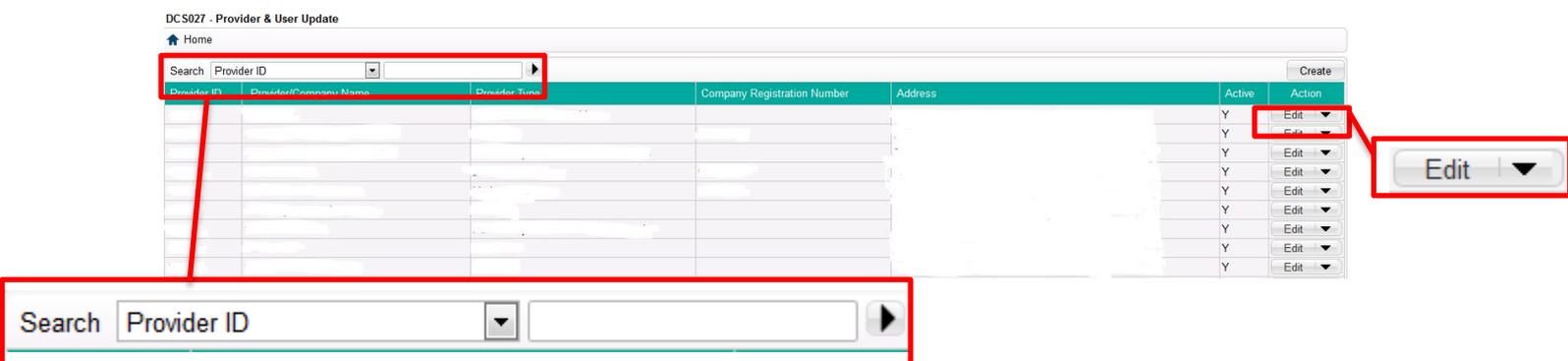
- Amend a provider record
- Create a provider
- View a provider record

### 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.*

Provider & User Update

Provider ID

**General** Participants

Provider Type: Please Select...  
Location: [Field]  
Provider/Company Name: [Field]  
Company Registration Number: [Field]  
Website: [Field]  
Bank Account Name: [Field]  
Bank Sort Code: [Field]  
Bank Account: [Field]  
Automatic Debt Recovery:   
Building Society Ref Number: [Field]  
Effective From Date: [Field]  
Effective To Date: [Field]  
Correspondence Type: Electronic

Postcode: [Field]  
Address: [Field]  
Description: [Text Area]

Save Save/Create Cancel

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

DCS027 - Provider & User Update

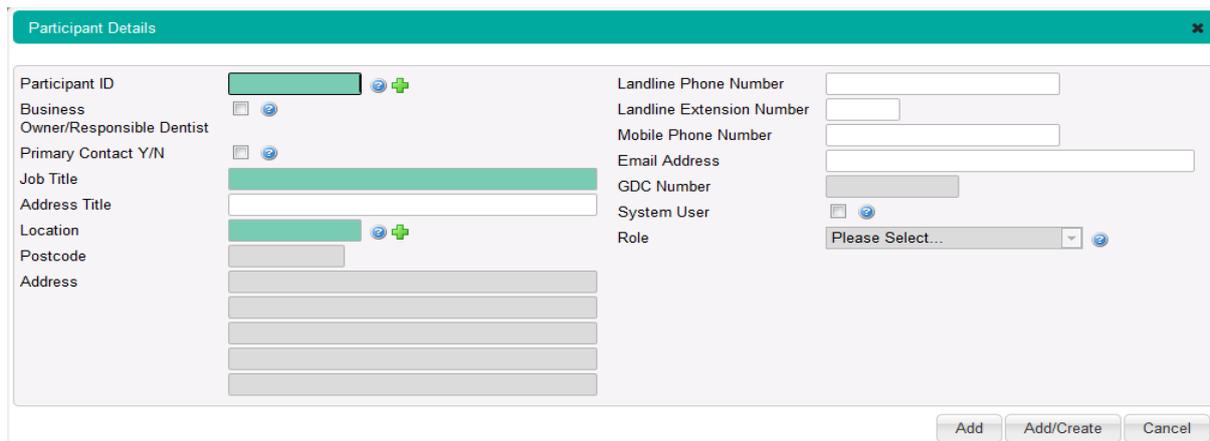
Home

Search Provider ID

Provider ID	Provider/Company Name	Provider Type	Company Registration Number	Address	Active	Action
					Y	Edit
					Y	Edit
					Y	Edit
					Y	Edit
					Y	Edit
					Y	Edit
					Y	Edit
					Y	Edit

Create

**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.



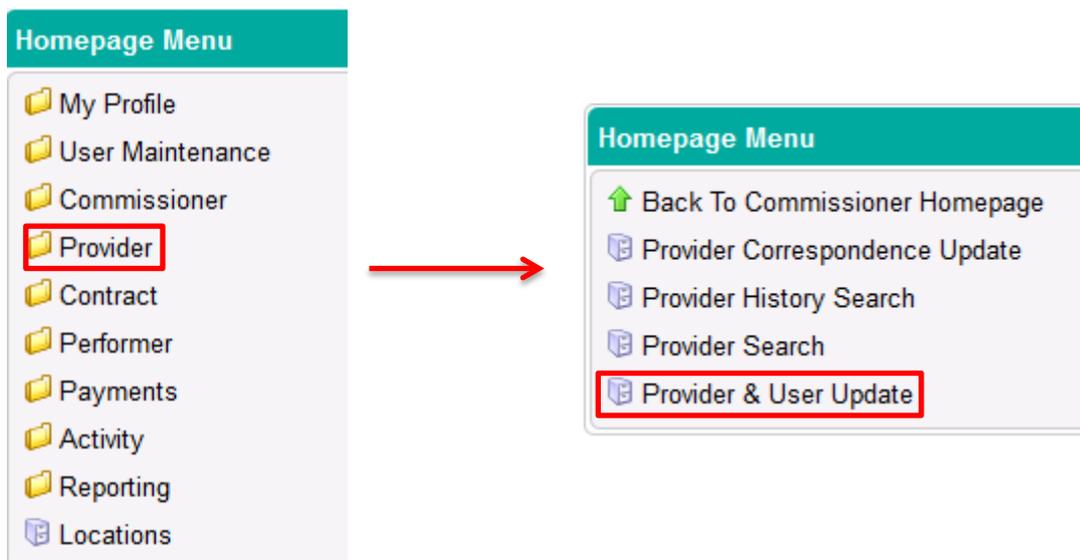
If the person you are looking to attach to the Provider record already has a Participant ID or has a performer number you can enter this in the **'Participant ID'** box to populate the user details.

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'.

DCS027 - Provider & User Update

Home

Search Provider ID

Provider ID	Provider/Company Name	Provider Type	Company Registration Number	Address	Active	Action
					Y	Edit
					Y	Edit
					Y	Edit
					Y	Edit
					Y	Edit
					Y	Edit
					Y	Edit
					Y	Edit

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.

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

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

Provider & User Update

Provider ID

General Participants

Search Participant ID

Create

Participant ID	Job Title	Business Owner/Responsible Dentist	GDC Number	System User	Role	Active	Action

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'**

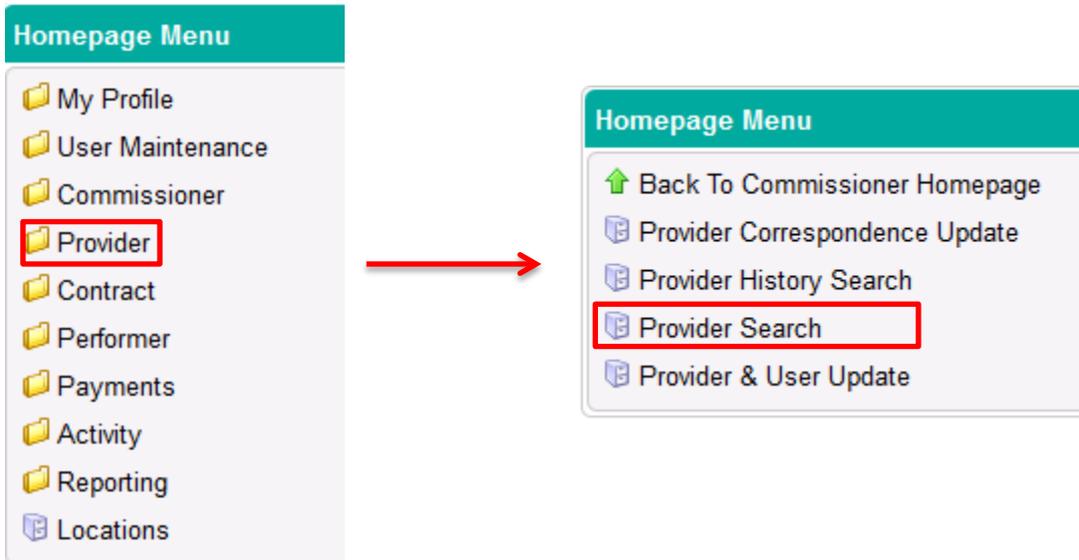
Once you have completed all mandatory fields listed in green, click **'Add'** to add the user to the Provider record and then click **'Save'** on the main Provider & User Update screen to complete the process.

The screenshot shows a 'Participant Details' form with various fields. The 'Participant ID' field is highlighted with a red box and a green plus icon. The 'Add' button at the bottom right is also highlighted with a red box.

**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.**

The screenshot shows the 'Provider Search' page. The dropdown menu for provider type is open, showing options like 'Individual Dental Practitioner' and 'Limited Liability Partnership'. The 'Health Body Code' field is highlighted with a red box. The 'Search' button is also highlighted with a red box.

**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	<input type="text" value="Please Select..."/>	Postcode	<input type="text"/>
Location	<input type="text"/>	Address	<input type="text"/>
Provider/Company Name	<input type="text"/>		<input type="text"/>
Company Registration Number	<input type="text"/>		<input type="text"/>
Website	<input type="text"/>		<input type="text"/>
Bank Account Name	<input type="text"/>	Description	<div style="border: 1px solid #ccc; height: 80px;"></div>
Bank Sort Code	<input type="text"/>		
Bank Account	<input type="text"/>		
Automatic Debt Recovery	<input checked="" type="checkbox"/>		
Building Society Ref Number	<input type="text"/>		
Effective From Date	<input type="text"/>		
Effective To Date	<input type="text"/>		
Correspondence Type	<input type="text" value="Electronic"/>		