

How to create, amend or view a performer record

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

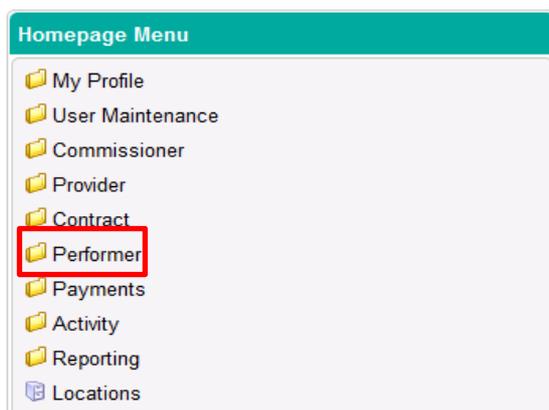
- Create a performer
- Amend a performer
- View performer details

Tip: The Performer menu option on your homepage will give you access to all the performer related functionality

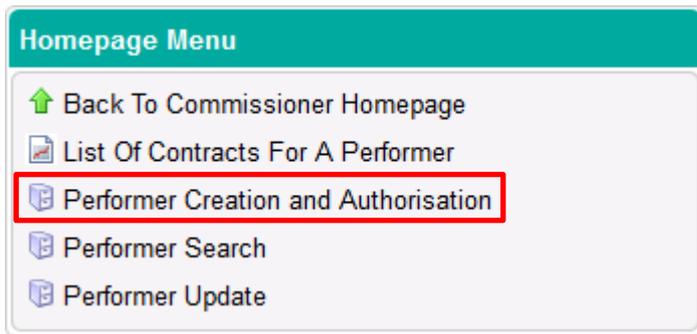
Creating a performer

Step 1: Log into Compass

Step 2: Click on the 'Performer' folder in the homepage menu.



Step 3: Click on 'Performer Creation and Authorisation'.



Step 4: Click on the 'Create Performer' button.



Step 5: Complete all the fields in this section marked as mandatory

Enter the performers GDC number or use the magnifying glass to search for the performer's record.

Enter the performer's date of birth. You can also upload a scanned copy of the birth certificate by clicking on the upload button.

The screenshot shows a web form titled 'Performer Details' with several sections:

- Performer Details:** GDC Number (with a magnifying glass icon), Health Body Code.
- General Performer Details:** Gender (Please Select...), Title (Please select...), Forename, Initials, Surname, Previous Surname, Date of Birth (with a calendar icon), Date of Birth Confirmed (with an Upload button), Performer Status (Under Creation), Rejection Reason.
- Contact Performer Details:** Address Title, Location (with a green cross icon), Postcode, Email Address.
- Other Performer Details:** NI Number, SD Number, Pension Scheme (2015 Scheme), GDC Suspended Status, Vocational Trainer, Foundation Dentist, Foundation Start Date, Foundation End Date, System User (checked), Role (Please Select...).

At the bottom, there are buttons for 'Submit for Authorisation', 'Save', 'Save/Create', and 'Cancel'.

Enter a **Location ID** or create a new one by clicking on the green cross.

If the performer is a foundation dentist tick the '**Foundation Dentist**' box and enter the start and end dates.

Ensure the '**System User**' box is ticked to give the performer access to Compass You will then need to select their compass user role.

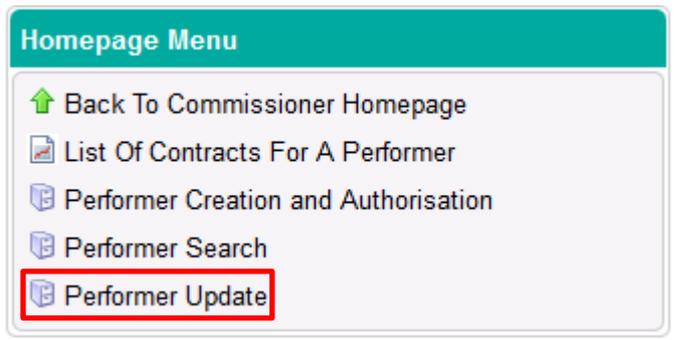
Click '**Submit for Authorisation**' to issue the performer record to the queue to be authorised by a colleague.

Amending Performer Details

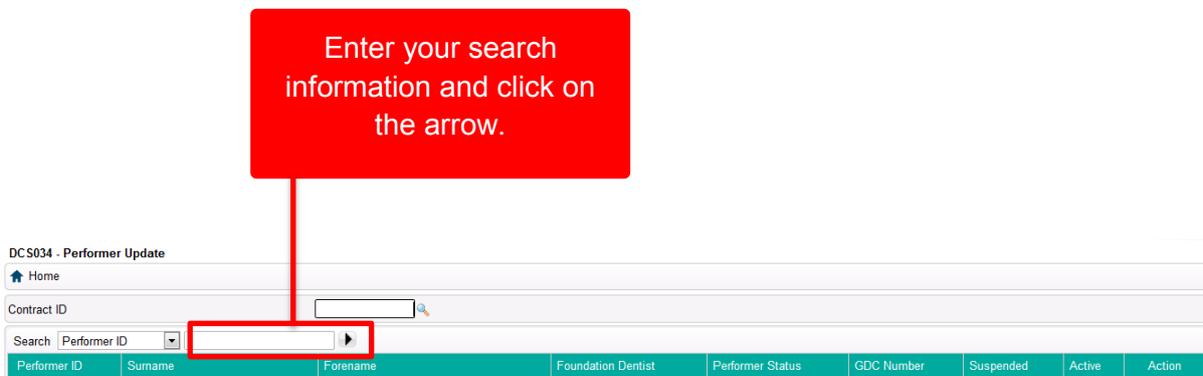
Tip:

Amending a performer record this way will only amend the information held for a performer. To amend performer details on a contract i.e. to end a performer on a contract, you will need to use the Contract >> Contract Amend option

Step 1: Click on the **'Performer'** option in the homepage menu.



Step 2: You will then be presented with a list of performers.



Once you have found the performer you wish to amend click on the **'Edit'** button under the **'Action'** column to open the **'Performer Update'** screen.

Step 3: You will then be presented with the below screen where you can amend details.

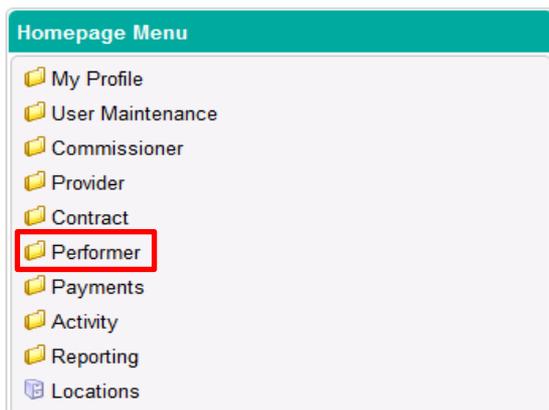
The screenshot shows the 'Performer Update' form with several sections: 'General Performer Details', 'Contact Performer Details', and 'Other Performer Details'. A red box highlights the 'Date of Retirement', 'Retirement Reason', 'Date of Death', and 'Date of Death Confirmed' fields, with a callout stating: 'Do not enter dates of death or retirement as these will be entered by Dental Services.' Another red box highlights the 'Save', 'Save/Create', and 'Cancel' buttons at the bottom right, with a callout stating: 'Click on 'Save' to submit the amendments.' Green boxes highlight mandatory fields throughout the form.

Please note: All green boxes are mandatory fields.

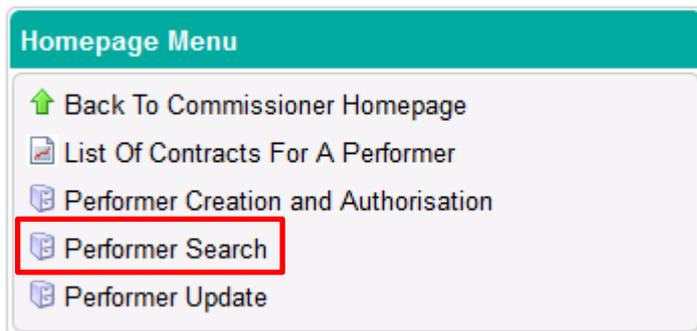
Click on 'Save' to submit the amendments.

Viewing performer details

Step 1: Log into the compass system and select the 'Performer' folder in the homepage menu.



Step 2: Click on 'Performer Search'



Step 3: Complete the search fields and click on 'Search'

DCS420 - Performer Search

Home

Health Body Code: Q59
Leicestershire and Lincolnshire AT

NI Number: []
Date of Birth From Date: []
Between: []
Date of Birth To Date: []
SD Number: []
Foundation Dentist: []

Home Address: []
Home Postcode: []
Phone Number (Mobile or Landline): []
Email Address: []
Status: []
Suspended: []

Search: GDC Number [] []

GDC Number	Performer ID	Surname	Forename	Foundation Dentist	Performer Status	Suspended	Active	Action

Search: GDC Number [] []

Records 0 to 0 of 0

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You can refine your search by using the drop down menu and clicking on the arrow.

Step 4: Your searches will be presented in the table below. Click on the 'View' button to open the record.

DCS420 - Performer Search

Home

Health Body Code: Q59
Leicestershire and Lincolnshire AT

NI Number:

Home Address:

Performer ID:

Date of Birth From Date:

Home Postcode:

Performer Initials:

Between:

Phone Number (Mobile or Landline):

Performer Forename:

Date of Birth To Date:

Email Address:

Performer Surname:

SD Number:

Status:

GDC Number:

Foundation Dentist:

Suspended:

Search Clear

Search GDC Number

Export Grid Data

GDC Number	Performer ID	Surname	Forename	Foundation Dentist	Performer Status	Suspended	Active	Action
				N	Current	N	Y	View
				N	Current	N	Y	View
				N	Retired	N	Y	View
				N	Retired	N	Y	View
				N	Retired	N	Y	View
				N	Current	N	Y	View
				N	Ceased	N	Y	View
				N	Retired	N	Y	View
				N	Retired	N	Y	View
				N	Retired	N	Y	View
				N	Ceased	N	Y	View
				N	Retired	N	Y	View
				N	Retired	N	Y	View
				N	Current	N	Y	View
				N	Retired	N	Y	View
				N	Current	N	Y	View

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View