

How a Provider creates additional users for a Compass account (e.g. practice staff)

The information required to create a participant is:

- Forename
- Surname
- Location (enter an existing location ID or create a new one if needed using the green plus)
- Email Address (**needs to be unique**)

There are a number of different user roles available and these can be seen by clicking [User Roles](#)

Providers Homepage

Homepage Menu

- My Profile
- User Maintenance
- Provider**
- Contract
- Performer
- Payments
- Pensions
- Activity
- Reporting
- Participant Update

From Homepage Menu select **Provider** file

Providers Homepage

Homepage Menu

- Back To Provider Homepage
- Provider Bank Account Update
- Provider Correspondence Update
- Provider History Search
- Provider Search
- Provider & User Update**

Within the Provider file select **Provider & User Update** option – you will then be presented with following screen. To update or add users please select the Edit option. Provider update facility then becomes available.

NHS Dental Services
provided by... Business Services Authority

DCS029 - Provider & User Update

Home

Search Provider ID

Provider ID	Provider/Company Name	Provider Type	Company Registration Number	Address	Action
735868	Mr Neil Paryani & Ms Poonam Paryani	Individual Dental Practitioner		26 STARRS MEAD, BURY ST. EDMUNDS, NG5 6GY	Edit

Provider & User Update has a General tab and a Participants tab. Select Participants tab

The **Participants** tab lists all users and indicates whether they are **Active**

If you wish to update an existing user then please select Edit option – a Provider cannot Edit their own details

Participant ID	Job Title	Business Owner/Responsible Dentist	GDC Number	System User	Role	Active	Action
RINTOUL, MANDEEP SINGH		Y	265014	Y	Business Owner	Y	Edit

If you wish to set up a new user then please select Create option

The following screen is presented if you wish to create a new user

The magnifying glass allows you to find an existing Participant – performers on contracts have their unique six digit personal number (*please note this is not their GDC number*), this is also their Participant ID. Non clinical staff (e.g. practice staff) would need to have a Participant ID created and this is achieved by selecting the green plus sign next to the **Participant ID** field.

Responsible Dentist Update

Participant ID

Business Owner/Responsible Person

Primary Contact Y/N

Job Title

Address Title

Location

Postcode

Address

Landline Phone Number

Landline Extension Number

Mobile Phone Number

Email Address

GDC Number

System User

Role

If you are aware of the Participant ID for a user you can use this to add a user to your contract – if user is a dentist then the Participant ID is their personal six digit number.

If you are creating a new user (**Add Participant**) having selected the green plus option then initially you will need to enter their name and click search.

Add Participant

Forename

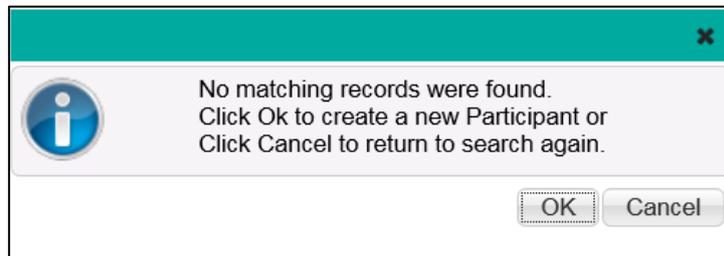
Surname

Previous Surname

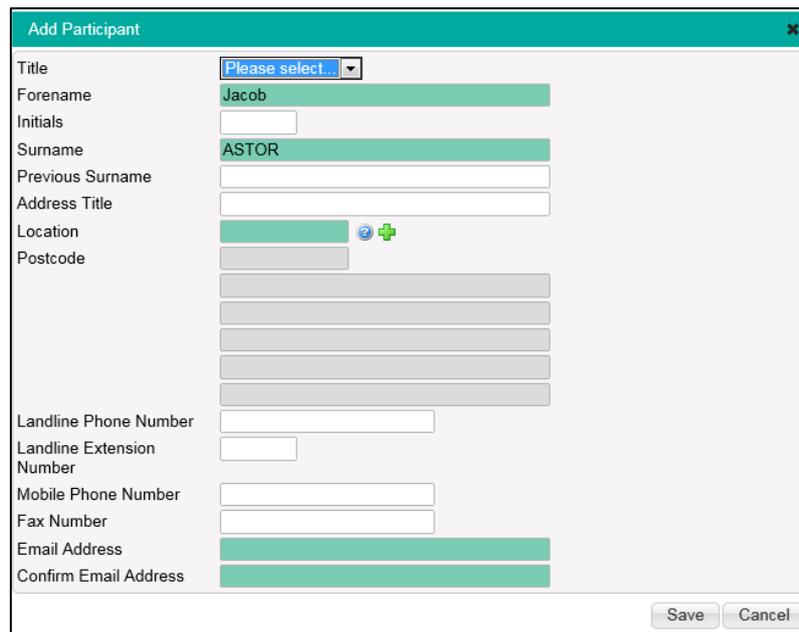
Postcode

Please enter the name of the user you wish to add in the fields presented – click **Search**.

You will be presented with the following Information alert if no matching records are found – click **OK**.



You are then presented with the following screen **Add Participant** – please add details as requested and click **Save**.



The "Add Participant" form is displayed in a window with a teal header and a close button (X) in the top right corner. The form contains the following fields:

- Title: A dropdown menu with "Please select." as the current selection.
- Forename: A text input field containing "Jacob".
- Initials: An empty text input field.
- Surname: A text input field containing "ASTOR".
- Previous Surname: An empty text input field.
- Address Title: An empty text input field.
- Location: A text input field containing a green bar, with a location pin icon and a plus sign to its right.
- Postcode: A text input field containing a grey bar.
- Landline Phone Number: A text input field containing a grey bar.
- Landline Extension Number: A text input field containing a grey bar.
- Mobile Phone Number: A text input field containing a grey bar.
- Fax Number: A text input field containing a grey bar.
- Email Address: A text input field containing a green bar.
- Confirm Email Address: A text input field containing a green bar.

At the bottom right of the form are two buttons: "Save" and "Cancel".

If the new user is not a Business Owner or the Primary Contact (only one per Provider allowed) you need to select System User Option. Select the Role most appropriate to the user. Click **Add**.

If you wish to add an additional User at this point click **Add/Create** option

Responsible Dentist Update

Participant ID: 100158 ASTOR, Jacob

Business Owner/Responsible Person:

Primary Contact Y/N:

Job Title:

Address Title:

Location: 37167

Postcode: TN8 7NG

Address: STABLE HOUSE, HEVER CASTLE, HEVER, EDENBRIDGE

Landline Phone Number:

Landline Extension Number:

Mobile Phone Number:

Email Address: JASTOR@HEVER.COM

GDC Number:

System User:

Role:

- Please Select...
- Please Select...
- Business View Only
- Business Owner
- Business/Practice Administrator
- Corporate Group Manager
- Practice Manager User
- Activity Manager**

The User is then added to the Participants ID list.

Provider Update

Provider ID: 169110

General | **Participants**

Search: Participant ID

Participant ID	Job Title	Provider Owner/Responsible Dentist	GDC Number	System User	Role	Active	Action
ASTOR, Jacob		N		Y	Activity Manager	Y	
Dentalign Orthodontics Llp, Unknown		Y		Y	Business Owner	Y	
Participant3, Placeholder		Y		Y	Business Owner	Y	

Records 1 to 3 of 3

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Please click Save, the new User will receive an activation email