Provider Details

This tab provides a facility to view the details for a provider.

Select the Provider from the drop down box, and then click Display. Alternatively you can search for the provider via the Search button facility. Enter the name of the provider in the space provided and then click Search (you can also search by UKPRN and UPIN Numbers). Double-click on the Provider you want to view details for from within the provider search box. This will then populate the Provider box with the chosen provider. Then click Display.
The chosen provider’s details will then be displayed.
Creating Dummy Providers

At some stage, you may need to create Dummy Providers. These are Provider's who do not yet have a UPIN Number and are unable to create plans in PaM until they have been assigned a UPIN Number.

To create a Dummy Provider, select the local area you want the Provider to appear under in the Provider drop-down box, and then click Create Dummy Provider.

Enter the details of the Provider in the Provider data entry screen. Note that the Name field is a mandatory field. The Dummy Ref is automatically generated. When you have finished, click Save.

NB: You can also delete a dummy provider by searching for it using the search facility. To go back to the original Provider Details page, click Return.
Assigning Provider’s to Regions and/or LSC’s

You may need to assign a Provider to additional Local LSC’s or Region’s so that they can create plans with that local area / region.

With the Provider details already loaded on the page, click on the Assign button. You will be promoted to select the Local LSC/Region you want to assign the Provider to. Select this from the drop down box, and then click Assign. You will receive a message confirming this has been successful.

Back at the Provider page, you will notice the Provider has now been assigned to the local area you have chosen (in the Provider box).