

COMPASS
Community Partner
Online Self-Registration
Quick Reference Guide



COMPASS Community Partner Overview

Organizations such as hospitals, church groups and other community-based groups that help Pennsylvania residents apply for health and human services can register to become a COMPASS Community Partner.

By registering as a COMPASS Community Partner, your organization can initiate and track applications through the COMPASS Community Partner Dashboard (CPD). This quick reference guide provides you the step-by-step instructions to register online to become a COMPASS Community Partner.

There are three main steps to registering:

1. Register your organization as a COMPASS Community Partner.
2. Register at least one, but no more than four individuals as delegated administrators (DA). These individuals will have the ability to approve or reject additional COMPASS users within your organization.
3. Register additional COMPASS users as needed.

Organizations are identified by their Federal Employer Identification Number (FEIN). You will need the FEIN prior to beginning registration. Each organization can have multiple locations. Each organization's applications are separated by the location, so only users under Location A will see applications submitted by Location A, and even though users under Location B are under the same Organization, they are under a different location and cannot see the applications on Location A's CPD.

Users can use one Business Partner ID, the B- account assigned after registration, to access multiple locations under an organization. Once registered under the organization, a user can request access to additional locations. They are able to switch between locations on their CPD.

Note: Once a user is a Delegated Administrator (DA), they must be the DA for all locations for which they have access. A User ID can only have access to one organization (FEIN) at a time. Users who need to access the CPDs of organizations with different FEINS are required to have separate Business Partner IDs.

Who to contact for self-registration questions and issues: RA-PWCOMPASSCP@pa.gov

Please note: Microsoft Internet Explorer 9.0 is the lowest supported browser.

This Quick Reference Guide is designed to assist you in completing your online self-registration.

COMPASS Community Partner Online Self-Registration Quick Reference Guide

Table of Contents

COMPASS Community Partner Overview	2
Registering a New Organization or Location	4
Registering a New Organization	4
Registering a New Location – User Doesn’t Have a Current Business Partner ID	4
Registering a New Location – User Has an Existing Business Partner ID	5
COMPASS User Registration	6
Registering a Delegated Administrator (DA)	6
Registering a New Business Partner ID as a Delegated Administrator	6
Registering a Current Business Partner ID as a Delegated Administrator	7
Registering a User	8
Register a New COMPASS User	8
Register as a COMPASS User With a Current Business Partner ID or Request Access to a Different Location	10
Accessing Identity Manager	10
Changing User Password, Email, or Security Questions	11
User and DA Functions in Identity Manager	11
Additional DA Functions in Identity Manager	12
Administrative Functions	12
Revoke a User’s Access to COMPASS, or a Specific Location (Delegated Administrators only)	12
Approving a User’s COMPASS Access Request (Delegated Administrators Only)	13
Removing an Organization	14
Forgot User ID?	15
Forgot/Change Password?	15

Registering a New Organization or Location

In order to register you'll need your organization's Federal Employer Identification Number, FEIN, and an active email address.

Registering a New Organization

1. From your internet browser, navigate to: www.compass.state.pa.us
2. Click on the 'LOG IN' button on the homepage and then scroll down and click 'LOG IN/REGISTER' under Community Partners.

Community Partners

START ONLINE SELF-REGISTRATION

3. Click on Start Online Self-Registration
4. Select COMPASS Community Partners on the Identify the Program screen and click Next.
5. On the User Profile Information page, click Next. (If you wish to register using an existing Business Partner ID, skip to the section below titled [Registering a New Location – User has an Existing Business Partner ID](#))
6. Enter your contact information on the User Profile Information Screen and click Next.
Note: If setting up a new organization or location, the information you enter here will **NOT** be linked to a User ID.
7. On the Organization Information page, enter the organization's Name and Tax ID (also known as FEIN). Then click Next.

• Organization Name

New Organization

• Organization Tax ID

876546165

Organization Registration Status:

Not Registered

8. If it is Not Registered, click on the Register Organization button.
Note: If after entering the FEIN for your organization, it is listed as Registered, you can either register a new location under the organization if your location is not listed, or begin registering users under a location that is already listed. See the Table of Contents for further instructions.
9. Enter the organization's information on the Organization Profile page. Make sure you enter as much detail as possible. Then click Next.
10. On the Data Release Agreement page, review the Data Release Agreement then click Accept if you accept the terms and conditions. Enter your full name to e-Sign and click Finish.
11. Your request will be sent to the Department of Human Services for review. You will receive an email when the request is processed.

Registering a New Location – User Doesn't Have a Current Business Partner ID

1. From your internet browser, navigate to: www.compass.state.pa.us
2. Click on the 'LOG IN' button on the homepage and then scroll down and click 'LOG

COMPASS Community Partner Online Self-Registration Quick Reference Guide

IN/REGISTER' under Community Partners.

Community Partners

START ONLINE SELF-REGISTRATION

3. Click on Start Online Self-Registration
4. Select COMPASS Community Partners on the Identify the Program screen and click Next.
5. On the User Profile Information page, click Next. (If you wish to register using an existing Business Partner ID, skip to the section below titled [Registering a New Location – User has an Existing Business Partner ID](#))
6. Enter your contact information on the User Profile Information Screen and click Next.

Note: If setting up a new organization or location, the information you enter here will **NOT** be linked to a User ID.

7. On the Organization Information page, enter the organization's Name and Tax ID (also known as FEIN). Then click Next. The system will display all locations currently registered under the FEIN. If the location you are attempting to register is not listed, select "Register Organization" at the end of the list.

Can't find your organization? If your organization registration status is "Not Registered" or your organization location is not listed in the options, please click the 'Register Organization' button below to register your organization. Please note: the Enterprise Business Partner Registration process will end when you leave to register your organization. You will need to re-visit this process to create your Business Partner ID.

[Register Organization](#)

Note: If your location is listed, you can begin registering users. See the Table of Contents for further instructions on User Registration.

8. Enter the organization's information on the Organization Profile page. Make sure you enter as much detail as possible. Then click Next.
9. On the Data Release Agreement page, review the Data Release Agreement then click Accept if you accept the terms and conditions. Enter your full name to e-Sign and click Finish.
10. Your request will be sent to the Department of Human Services for review. You will receive an email when the request is processed.

Registering a New Location – User Has an Existing Business Partner ID

1. From your internet browser, navigate to: www.compass.state.pa.us
2. Click on the 'LOG IN' button on the homepage and then scroll down and click 'LOG IN/REGISTER' under Community Partners.

Community Partners

START ONLINE SELF-REGISTRATION

3. Click on Start Online Self-Registration
4. Select COMPASS Community Partners on the Identify the Program screen and click Next.
5. If you have a current Business Partner ID with the organization you are attempting to register a new location under, click "Requesting COMPASS access with your existing Business Partner ID – CLICK Here"
6. Log in to your Business Partner account.
7. On the "Request Enterprise Business Partner Access: Profile" screen, review your contact information and update accordingly, and enter your organization's FEIN. The system will display all locations currently registered under the FEIN. If the location you are attempting to register is not listed, select

COMPASS Community Partner Online Self-Registration Quick Reference Guide

“Register Organization” at the end of the list.

Register Organization

8. Enter the organization’s information on the Organization Profile page. Make sure you enter as much detail as possible. Then click Next.
9. On the Data Release Agreement page, review the Data Release Agreement then click Accept if you accept the terms and conditions. Enter your full name to e-Sign and click Finish.
10. Your request will be sent to the Department of Human Services for review. You will receive an email when the request is processed.

COMPASS User Registration

Registering a Delegated Administrator (DA)

Once you receive a confirmation email that your organization has been approved by the Department, you must choose an administrator from your organization to be a Delegated Administrator (DA). These individuals will have the ability to approve or reject additional COMPASS users within your organization, manage your organization location, and have access to the COMPASS Community Partner Dashboard. Each registered organization may have up to four DAs at one time. Current users under an organization can request to be “promoted” to DA. See [User and DA Functions in Identity Manager](#) for more information.

Registering a New Business Partner ID as a Delegated Administrator

1. From your internet browser, navigate to: www.compass.state.pa.us
2. Click on the ‘LOG IN’ button on the homepage and then scroll down and click ‘LOG IN/REGISTER’ under Community Partners.

Community Partners

START ONLINE SELF-REGISTRATION

3. Click on Start Online Self-Registration
4. Select COMPASS Community Partners on the Identify the Program screen and click Next.
5. On the General Information page, if you do not have a current Business Partner ID with the organization you wish to register under, and would like to create a new one, click Next.
6. Enter your information on the User Profile Information page and click Next.
7. On the Organization Information page, enter the organization’s Name and Tax ID (also known as FEIN). Then click Next.
8. Select the location you would like to register under, and click Next. If the location is not listed, see *Registering a New Organization or Location* in the Table of Contents.

COMPASS Community Partner Online Self-Registration Quick Reference Guide

• Organization Name

New Org

• Organization Tax ID

876546165

Organization Registration Status:

Registered

Location:

☒ Select the below location option if this is your location address

Location Name

New Organization

Street Address 1

100 Business Lane

Street Address 2

Suite 600

City

Harrisburg

State

PA

Zip Code

17102

9. On the Organization Role screen, select “Delegated Administrator” to become a Delegated Administrator.
Tell us about your role in your organization:

• Organization Role

☒ I am an Administrative Business Partner user (Delegated Administrator)

☐ I am a non-Administrative Business Partner user

10. Enter a Brief Explanation on the Application Details screen for why you are requesting the access and click Next.
11. On the User Release Agreement page, read the User Confidentiality Agreement and Management Directive, and select that you have read and understand the entire agreement. Enter your Full Name in the box to e-Sign, then click Next.
12. Select and answer the security questions on the Security Questions page. Then select Finish.

IMPORTANT:

- Be sure to write down your password and keep it in a safe place
- Take note of your hint questions and answers

13. Your information will be sent to the Department of Human Services for review. Once your request is approved you will receive an email with your Business Partner ID. You can now log in to COMPASS. You will use the password you set up during the registration process. Please note: To ensure you receive this confirmation email please add automatedmailDONOTREPLY@pa.gov to your safe senders list. If you need assistance, please contact your organization's technical support staff.

Registering a Current Business Partner ID as a Delegated Administrator

1. From your internet browser, navigate to: www.compass.state.pa.us
2. Click on the ‘LOG IN’ button on the homepage and then scroll down and click ‘LOG IN/REGISTER’ under Community Partners.

Community Partners

COMPASS Community Partner Online Self-Registration Quick Reference Guide

START ONLINE SELF-REGISTRATION

3. Click on Start Online Self-Registration
4. Select COMPASS Community Partners on the Identify the Program screen and click Next.
5. If you have a current Business Partner (B-) account with the organization you are attempting to get COMPASS access under, click “Requesting COMPASS access with your existing Business Partner ID (B-)”? Click [HERE](#)”.
6. Log in to your Business Partner account.
7. On the “Request Enterprise Business Partner Access: Profile” screen, review your contact information and update accordingly, and enter your organization’s FEIN. The system will display all locations currently registered under the organization. Select the location you are registering under, and enter a brief explanation for why you need DA access. Once this is completed click Next.
8. On the User Agreement page, read the User Confidentiality Agreement, select that you have read and understand the entire agreement and enter your Full Name in the box to e-Sign, then click Finish.
9. Your information will be sent to the Department of Human Services for review. Once your request is approved you will receive an email informing you that you have access. You will use your existing Business Partner ID and password to log in to COMPASS.

Registering a User

Once a Delegated Administrator (DA) has been registered, and they receive an approval email with their Business Partner ID, users may register. An individual who is registered as a DA will have all of the same access as an individual registering as a user (plus DA access) and does not need to register again as a user. Each registered organization may have an unlimited number of users. Each individual who accesses the Community Partner dashboard must register as a user separately.

Note: Each User ID is required to have a unique email address. If there is an individual in your organization who is trying to register and is stopped at the User Profile screen because their email already exists, they must go back to the General Information screen in registration and click “Requesting COMPASS access with your existing Business Partner ID (B-)”? Click [HERE](#).” They will then be required to log in to add COMPASS access to their existing account. Access may only be added to the same User ID if access is being requested under the FEIN that the existing Business Partner ID is already associated with.

Register a New COMPASS User

1. From your internet browser, navigate to: www.compass.state.pa.us
2. Click on the ‘LOG IN’ button on the homepage and then scroll down and click ‘LOG IN/REGISTER’ under Community Partners.

Community Partners

START ONLINE SELF-REGISTRATION

3. Click on Start Online Self-Registration
4. Select COMPASS Community Partners on the Identify the Program screen and click Next.
5. On the General Information page, if you do not have a current Business Partner ID with the organization you wish to register under, and would like to create a new one, click Next.
6. Enter your information on the User Profile Information page and select Next.

COMPASS Community Partner Online Self-Registration Quick Reference Guide

7. On the Organization Information page, enter the organization's Name and Tax ID (also known as FEIN). Then click Next.

8. Select the location you would like to register under, and click Next.

• Organization Name	New Org
• Organization Tax ID	876546165
Organization Registration Status:	Registered

Location: ☒ Select the below location option if this is your location address

Location Name	New Organization
Street Address 1	100 Business Lane
Street Address 2	Suite 600
City	Harrisburg
State	PA
Zip Code	17102

9. On the Organization Role screen, select "Business Partner user" to become a Business Partner user.

Tell us about your role in your organization:

- Organization Role
- ☐ I am an Administrative Business Partner user (Delegated Administrator)
- ☒ I am a non-Administrative Business Partner user

10. Enter a Brief Explanation on the Application Details screen for why you are requesting the access and select Next.

11. On the User Release Agreement page, read the User Confidentiality Agreement and Management Directive, and select that you have read and understand the entire agreement. Enter your Full Name in the box to e-Sign, then click Next.

12. Select and answer security questions on the Security Questions page. Then select Finish.

IMPORTANT:

- Be sure to write down your password and keep it in a safe place
- Take note of your hint questions and answers

13. Your information will be sent to your organization's Delegated Administrator(s) for review. Once your request is approved you will receive an email with your Business Partner ID. You will use the password you set up during the registration process. Please note: To ensure you receive this confirmation email please add automatedmailDONOTREPLY@pa.gov to your safe senders list. If you need assistance, please contact your organization's technical support staff.

Register as a COMPASS User With a Current Business Partner ID or Request Access to a Different Location

1. From your internet browser, navigate to: www.compass.state.pa.us
2. Click on the 'LOG IN' button on the homepage and then scroll down and click 'LOG IN/REGISTER' under Community Partners.

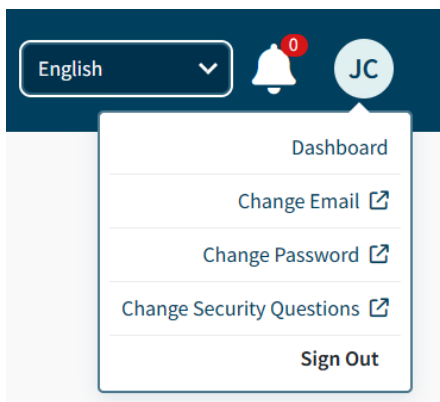
Community Partners

START ONLINE SELF-REGISTRATION

3. Click on Start Online Self-Registration
4. Select COMPASS Community Partners on the Identify the Program screen and click Next.
5. If you have a current Business Partner (B-) account with the organization you are attempting to get COMPASS access under, click "Requesting COMPASS access with your existing Business Partner ID – CLICK Here".
6. Log in to your Business Partner account.
7. On the "Request Enterprise Business Partner Access: Profile" screen, review your contact information and update accordingly, and enter your organization's FEIN. The system will display all locations currently registered under the organization. Select the location you are registering under, and enter a brief explanation for why you need access. Once this is completed click Next.
8. On the User Agreement page, read the User Confidentiality Agreement, select that you have read and understand the entire agreement and enter your Full Name in the box to e-Sign, then click Finish.
9. Your information will be sent to your organization's DA(s) for review (or to the Department of Human Services if you are a DA). Once your request is approved you will receive an email informing you that you have access. You will use your existing Business Partner ID and password to log in to COMPASS. Please note: To ensure you receive this confirmation email please add automatedmailDONOTREPLY.gov to your safe senders list. If you need assistance, please contact your organization's technical support staff.

Accessing Identity Manager

Identity Manager (IDM) is where user and organization management occurs. It can be accessed by first logging in to your Community Partner Dashboard (CPD). Both Users and Delegated Administrators can access IDM by clicking on the circle with their initials in the top right hand corner of the CPD, and then selecting either Change Email, Change Password, or Change Security Questions.

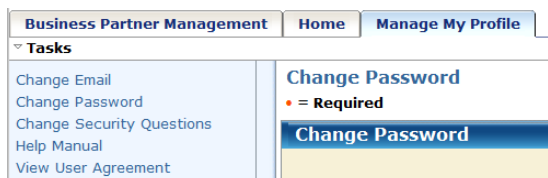


COMPASS Community Partner Online Self-Registration Quick Reference Guide

These links will take you directly to the screen for each of these functions, but you can then navigate to other sections of IDM by selecting the Business Partner Management, Home, or Manage My Profile tabs.

Changing User Password, Email, or Security Questions

Under the Manage My Profile tab the user can change their email, password and security questions by clicking on the links on the left hand side and following the instructions on the screen. Users can also view the Help Manual and User Agreement from here.



User and DA Functions in Identity Manager

Users and DAs can also access additional functions in Identity Manager. To use these functions, click on the Business Partner Account Management tab.

- **Manage Organization**
 - Associate Organization Location – The DA or User can request to be associated to other locations they do not currently have access to.
 - View Data Release Agreement – The DA or User can view the Data Release Agreement they electronically signed when applying for access
- **Manage User**
 - Request Promote/Demote Business Partner Access – The DA can request to be demoted to User status. The User can request to be promoted to DA.
 - Note: A DA must be the DA for all locations, and a User must be a User for all locations under the organization. A request here is for all locations the user is associated with.

Additional DA Functions in Identity Manager

Delegated Administrators can also access additional functions by clicking on the Administrator tab in the CPD.

Administrative Functions

Location: Compass Test

Administrative Functions

Select a topic to access the administrative function.

For more information on managing users and your organization/location, view the [Online Self-Registration Guide](#). 



Manage User

Manage your users' access to the COMPASS Dashboard and reset a user's password.



Manage Organization

Manage organization location information to include address updates/changes and review the Data Release Agreement.



Work List

View items that are on your work list and search for previously submitted tasks.

There are three options, with the following available functions:

- **Manage User**
 - Revoke Location Access – The DA can revoke Users based on location.
 - Revoke COMPASS Access – The DA can revoke all COMPASS access for a User.
- **Manage Organization**
 - Add Organization Location – The DA can add additional locations under the organization
 - Update Organization Location – The DA can change or update the organizations address information.
- **Reset User Password** – DAs can send a temporary password to a user in their organization, so that the user can reset their password and security questions.
- **Work List** – Shows all pending user requests the DA has not acted on yet.

Revoke a User's Access to COMPASS, or a Specific Location (Delegated Administrators only)

1. To remove a user's access, first log in to your CPD and click on the Administration tab in the left-hand navigation bar.

COMPASS Community Partner Online Self-Registration Quick Reference Guide

Administration

2. Click on “Manage User” under Administrative Functions. This will take you to Identity Manager.
3. Click on “Manage Users” on the left hand navigation bar. This will display more options. Click on the link that describes the action you are trying to take.
 - a. **Enterprise Revoke Organization Location Access** – Allows the DA to revoke access to a specific location. The user will still be able to access COMPASS under the locations for which they still have access. This is used when the user no longer will be working at a certain location but is still employed by the organization.
 - b. **Revoke COMPASS Application Access** – This will revoke all COMPASS access the user has under the organization. The user will no longer be able to access COMPASS once this task is completed. This is used when the user is no longer employed by the organization, or no longer uses COMPASS.
4. Click on the search button to display all users in the organization. You can use the search filters if you wish to refine your search.
5. Once you have located the user you wish to remove access for, select their User ID and click Select.

Select	User ID	Last Name	First Name	Email	Organization Name
☒	b-seconuser	User	Second	second@user.fake	Organizati8569

1 - 1 of 1

Select Cancel

6. If you are:
 - a. Revoking Organization Location Access, select the location that you are removing and click Next. You can enter comments on the final screen if you wish, and the user will see the comments in the email they receive. Click Finish to complete the task.
 - b. Revoking COMPASS Application Access, you may enter comments that the user will see in the email they receive. Click Submit to complete the task.
7. The user will receive an email informing them of the action that was taken.

Approving a User's COMPASS Access Request (Delegated Administrators Only)

- When the user registers, all DAs who are registered under the organization location that the user is registering under will receive an email informing them of the new registration. The DA can click on the link in the email to go to Identity Manager, or can access Identity Manager by logging in to their CPD, clicking the Administration tab at the top, and then clicking on Manage User.
- The DA will see the request in their Work List.
- Clicking on the Approval request will open the request and allow the DA to review the request, and Approve or Reject the request.

Work List

Status	Name	Last Updated On	Initiated By	Workflow Level
	Approval - User "b-seconuser" registering for "COMPASS" in Organization "Organizati8569"	6/18/15 10:37 AM	b-seconuser	Event Level Workflow

Removing an Organization

If an organization, or location under an organization, no longer assists individuals when applying for health and human services benefits, they can have the organization or location removed from COMPASS.

- To begin removing an organization, go to www.compass.state.pa.us and click on 'LOG IN' and then 'LOG IN/REGISTER' under Community Partners. On the bottom of the page, click the link 'Community Partner Cancellation Form'.

- Submit and track all applications in one place
- E-Sign applications for applicants
- Access saved and submitted applications for up to 180 days
- View the status of submitted applications
- Submit documents electronically for applicants and recipients
- View quick reports of applications
- View detailed reports of applications through a search function
- View messages from headquarters
- Access forms, links, and other publications

If you're a Medical Assistance (MA) provider and used your MA provider number when filing the application, you'll receive notices of your patient's eligibility, including their MA ID number for billing purposes.

START ONLINE SELF-REGISTRATION

[Online Self-Registration Guide](#) 



Community Partner Account Cancellation

An organization can remove itself from the list of registered COMPASS Community Partner organizations at any time by completing the [Community Partner Cancellation Form](#).

- Enter all of the required information and click the Submit button at the bottom of the page.
- The information will be sent to the Department, and the organization or location will be removed within five business days.

COMPASS Community Partner Online Self-Registration Quick Reference Guide

Community Partner Cancellation Form

Contact Person

First Name (required)

Middle Name (required)

Last Name (required)

Title (required)

Phone Number (required)

(###) ###-####

Email (required)

Forgot User ID?

If you cannot remember your Business Partner ID, please do the following:

1. Go to www.compass.state.pa.us
2. Click on the 'LOG IN' button on the homepage and then scroll down and click 'LOG IN/REGISTER' under Community Partners.
3. Under the User ID field, click on the "Forgot Username" link.
4. Enter your first name, last name and email address. Your entries here need to match how you entered this information when you first registered. Click Ok.
5. You will receive a confirmation page that your User ID has been sent to your email address. Close your browser window.
6. Obtain your Business Partner ID from the email. To ensure you receive this confirmation email please add automatedmailDONOTREPLY@pa.gov to your safe senders list. If you need assistance, please contact your organization's technical support staff.

Note: If you are unable to retrieve your User ID, please call 1-800-281-5340.

Forgot/Change Password?

If you are unable to log in to your Business Partner account, first try to reset your password. To reset your password, please do the following:

COMPASS Community Partner Online Self-Registration Quick Reference Guide

1. Go to www.compass.state.pa.us
2. Click on the 'LOG IN' button on the homepage and then scroll down and click 'LOG IN/REGISTER' under Community Partners.
3. Under the Password field, click on the "Forgot Password" link.
4. Enter your Business Partner ID, then click Ok.
5. You will be provided two of your three security questions to answer. Enter your answers and click Ok.
6. Enter a new password and confirm the new password. The password must meet password policy requirements as listed on the screen. Click Submit.
7. You will receive a confirmation page that your password has been successfully changed. Close your browser window, return to COMPASS and log in.

Note: If you are unable to reset your password, please call 1-800-281-5340.