DENTALXPAND LEARNING CENTER / PROVIDER AND DSO

Manage Providers and Clients

A detailed guide to provider and client directory records, linked employee shadows, search and views, field verification, status lifecycle, archive and deletion, external login readiness, practice relationships, tenant policy, and safe troubleshooting.

VERSION	1.0	AUDIENCE	Administrators and authorized client managers
FORMAT	Website + PDF	SCOPE	DentalXpand Providers / Clients directory

Fictional screenshots and protected provider data
Every screenshot uses fictional training data. Never place real Tax IDs, credentials, passwords, patient records, claim details, payer secrets, another client, another tenant, or Guardian Connect data into a training record, Notes field, message, screenshot, ticket, or AI prompt.

Contents

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How to use this guide
Confirm account, organization, route, action permission, and approved purpose first. Then find or create the correct provider, verify sensitive fields, understand linked employee effects, use lifecycle actions deliberately, and create external access only after valid practice assignment.

01 / RECORD MODEL AND ACCESS

Know which linked record and permission layer you are changing

Record or layer	Reviewed purpose	Boundary
Provider / client	Directory identity, contacts, address, identifiers, practice metadata, status, notes, and optional login link.	Belongs to one organization and is not a general contact list or a practice-access grant.
Employee shadow	External provider-role employee row used by existing task, client-instruction, and employee-linked foreign keys.	Created with the provider and synchronized for selected identity, contact, designation, and active-state fields.
User account	Optional authentication and app-user identity for the provider portal.	Super admin creation only; requires email, seat, no existing login, and valid practice links.
Practice	Canonical organization-owned practice or location record.	Practice Name text on a provider does not create this record or grant access.
Provider-practice link	Connects a provider to same-organization practices and can identify a primary relationship.	Composite tenant relationships reject cross-organization links.
Membership access	Connects an external user's membership to approved practices.	Practice scope does not replace route or action permissions.

Action	Page control	Service and data control
Open	Admin/super admin or pages:providers on the deployed route.	Authenticated organization access and provider read policy.
Create	providers:create	Authorized admin/manager plus tenant insert permission.
Edit	providers:update	Authorized admin/manager plus tenant update permission.
Archive	providers:delete	Authorized admin/manager plus tenant update permission.
Permanent delete	Super admin only	Super admin service plus tenant delete policy and relationship constraints.
Create login	Super admin only	Tenant user manager, seat, valid email, provider link, and same-organization practices.

Open Providers	Roles and access	Tenant context
Open Providers	**Roles and access**	**Tenant context**

02 / DIRECTORY

Read summary counts and returned rows in the correct scope

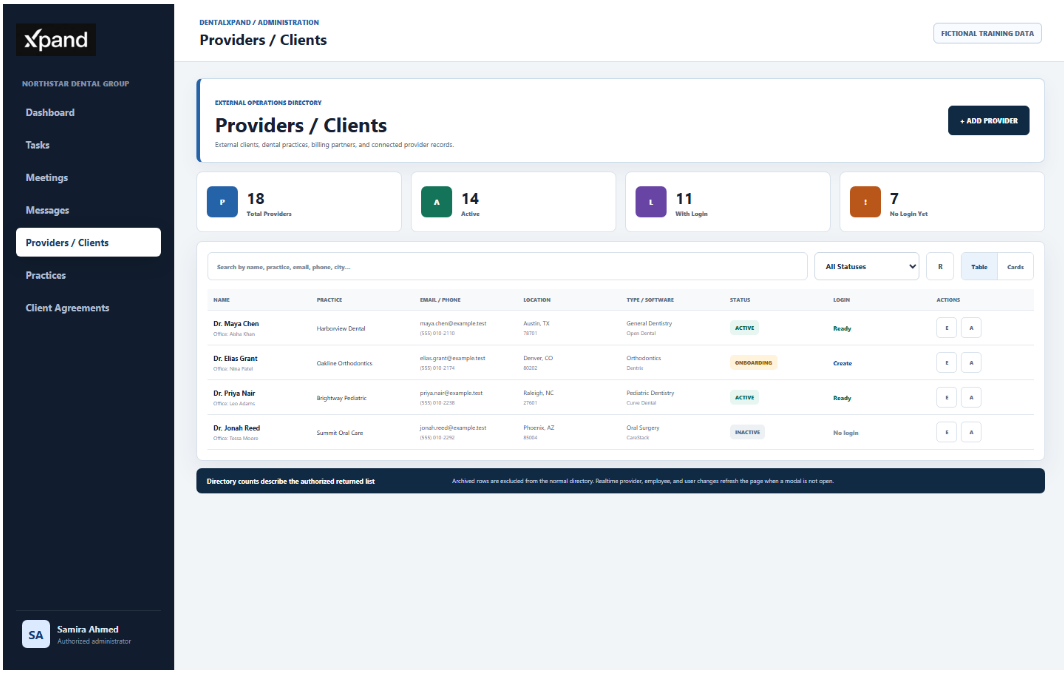

Figure 1. Fictional Providers / Clients directory with navigation, summary cards, filters, views, rows, login readiness, and permitted actions.

Summary	Current calculation	Do not assume
Total Providers	All rows returned after normal archived-status exclusion.	Not every platform, tenant, or historical archived provider.
Active	Returned rows with provider status active.	Does not prove login, employee, practice, agreement, or downstream readiness.
With Login	Returned rows with a linked user_id.	Does not prove password change, active membership, or complete practice assignment.
No Login Yet	Returned rows without a linked user_id.	Does not mean a login is approved or ready to create.

Realtime refresh

Provider, employee, and user changes refresh silently while the page is open and no provider modal is active. Re-read the row before editing after another operator changes it.

03 / SEARCH, FILTER, AND VIEWS

Find the correct record with the least-sensitive useful field

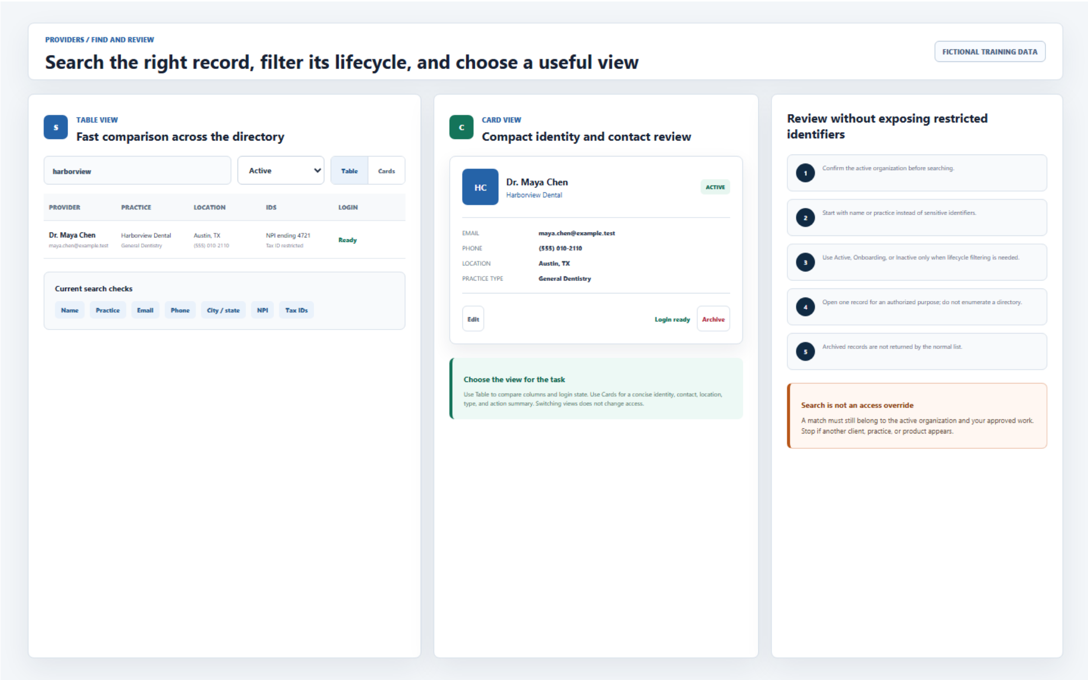

Figure 2. Fictional table search and card review with Active filtering, matched fields, login state, and directory-use boundaries.

Control	Current behavior	Safe use
Search	Matches name, practice, email, phone, city, state, provider NPI, practice NPI, provider Tax ID, and practice Tax ID.	Start with name or practice and use sensitive identifiers only when required.
Status	All, Active, Onboarding, or Inactive filter the returned list.	Archived rows are excluded before this filter and do not return when it is cleared.
Refresh	Reloads the normal directory request.	Refresh once; do not use repeated queries to probe missing records.
Table	Compares identity, practice, contact, location, type, software, status, login, and actions.	Open only the record needed for approved work.
Cards	Shows concise identity, contact, location, type, status, login, and actions.	Presentation changes, but tenant and action access do not.
Empty result	Shows either no providers or no matches for current filters.	Do not infer another tenant's record should be visible or create a duplicate without checking.

04 / CREATE A PROVIDER OR CLIENT

Create one verified record and its compatible employee shadow

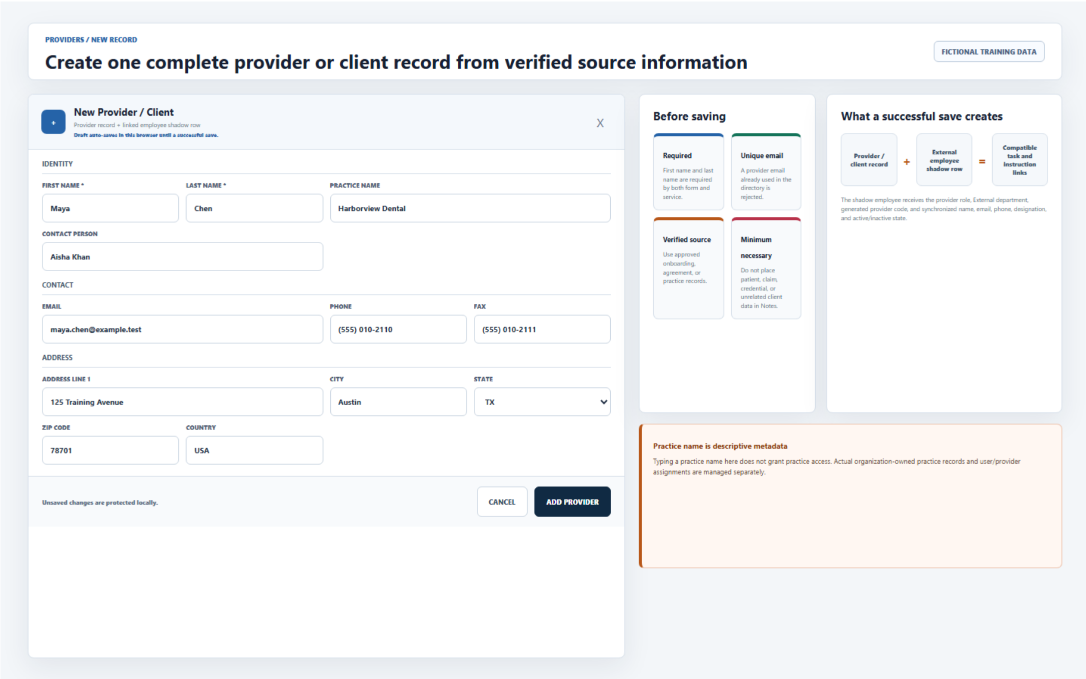

Figure 3. Fictional new-record form with required identity, contact, address, browser draft, source checks, employee shadow, and practice-name warning.

Step	Reviewed behavior	Required discipline
Verify source	Use approved onboarding, agreement, credentialing, or practice information.	Confirm active organization and search for an existing provider first.
Open form	Country defaults to USA, status to Active, and a browser-local new-record draft begins.	Create permission and authorized admin/manager service access must agree.
Enter names	First and last name are required.	Do not substitute a practice, shared account, email address, or placeholder identity.
Add optional fields	Practice metadata, contact, address, IDs, license, details, status, and notes are available.	Enter only verified minimum-necessary operational data.
Review draft	Every change is saved locally; cancel or close does not clear it.	Recheck all reopened fields. Only successful save clears the draft.
Save	Text is trimmed, email lowercased, duplicate provider email rejected, employee shadow created, and provider linked.	Submit once and wait for the success message and refreshed row.
Failure cleanup	If provider insertion fails after employee creation, the service attempts to delete the incomplete shadow.	Preserve the safe error and escalate; do not create manual cleanup rows.

05 / FIELDS, EDITING, AND LINKED SYNC

Verify protected identifiers and linked effects before saving

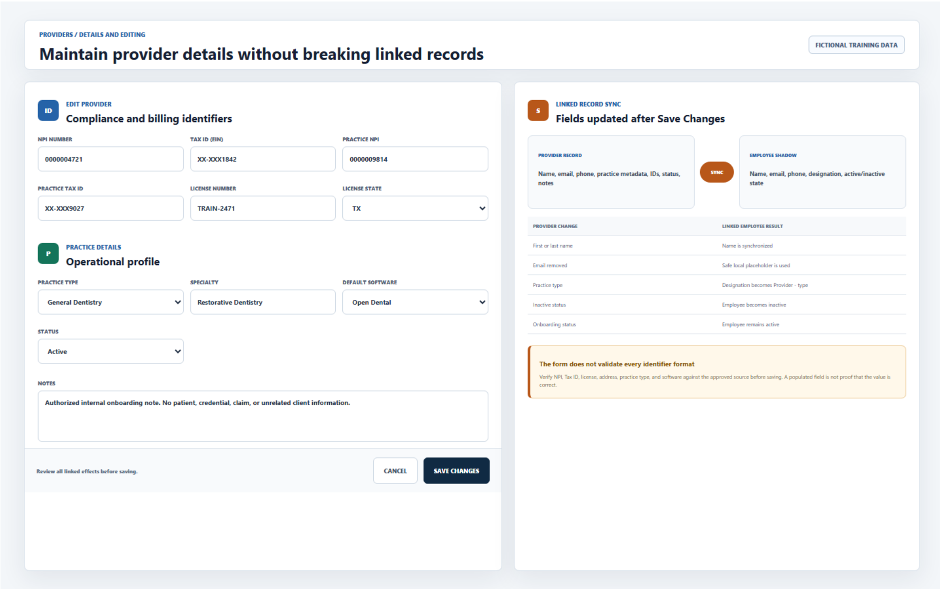

Figure 4. Fictional compliance, practice, notes, linked employee synchronization, and identifier-verification training view.

Field or edit	Current behavior	Operator check
Identity and contact	Name, practice name, contact person, email, phone, fax, and address are stored on the provider.	Use approved business details; normalized provider email must remain unique.
Identifiers	Provider/practice NPI and Tax ID plus license number/state are stored as text.	The form does not prove format, ownership, or validity; verify against the approved source.
Practice details	Type, specialty, default software, and status support operations.	Practice Name and designation remain metadata, not access grants.
Notes	Internal free text is available.	Exclude passwords, portal credentials, patient data, claims, copied records, and unrelated clients.
Name/email/phone	Selected changes synchronize to the employee shadow; cleared provider email uses an internal local placeholder on the employee.	A provider without a valid email cannot create a login; the placeholder is not a contact address.
Type/status	Practice type updates employee designation; Inactive inactivates the employee; Active or Onboarding keeps it active.	Review tasks, instructions, account, practice access, and offboarding effects first.

Stale edit drafts

The edit modal uses a provider-specific browser draft. Re-read every field before Save Changes, especially after another operator or realtime update may have changed the record.

06 / LIFECYCLE

Use status and archive before exceptional permanent deletion

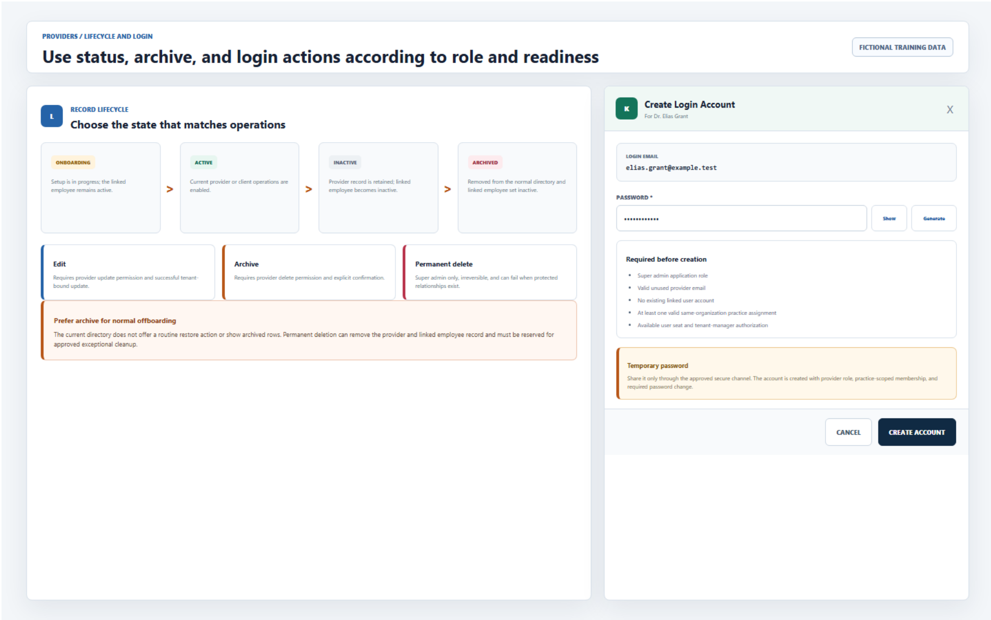

Figure 5. Fictional status lifecycle, edit/archive/delete controls, login prerequisites, and temporary-password handling.

State or action	Current effect	Required use
Onboarding	Visible in the normal list; linked employee remains active.	Approved setup in progress; does not create login or access.
Active	Counted Active; linked employee remains active.	Current approved provider or client operations.
Inactive	Visible under Inactive; linked employee becomes inactive.	Retain the record while current activity is paused or ended.
Archive	Status archived, removed from normal list, linked employee inactive.	Preferred routine offboarding or historical retention action.
Restore	No routine archived-row list or restore control on the current page.	Use approved recovery; never run an ad hoc status update.
Permanent Delete	Super admin deletes provider then attempts linked employee deletion; constraints may reject it.	Irreversible exceptional cleanup after retention and dependency review.

Prefer archive

Archive retains operational history and removes the provider from the normal list. Permanent deletion can affect linked records and must not be used as routine offboarding.

07 / PROVIDER LOGIN READINESS

Create practice-scoped external access only after every prerequisite passes

Check	Current implementation	Required result
Role	Directory and provider service require super admin; backend requires tenant-user management.	Use the approved super admin, never a borrowed account.
Email	Provider must have an email and no linked user; backend rejects an existing user email.	Valid, approved, unused provider email.
Practice links	Helper loads practice_providers and sends their practice IDs.	At least one valid same-organization provider-practice link.
Seat	Backend checks plan and subscription user-seat availability.	Available seat before provisioning.
Password	Form requires at least eight characters and can generate a temporary value.	Handle as a secret and transmit only through the approved secure channel.
User and auth	Backend creates app user, authentication identity, provider role, and links the provider and employee.	One complete linked identity; no duplicate user or provider.
Membership	External membership uses practice scope and receives assigned-practice rows.	No broad organization-scoped external account.
Onboarding	Temporary-password membership requires password change before normal active use.	Provider completes the password-change flow before portal operations.

Practice Name is not login scope
Typing or editing provider Practice Name does not satisfy the external-account practice requirement. Never bypass the requirement with another provider, another tenant's practice ID, or a broad organization membership.

User Management	Password guide	Portal lesson
User Management	**Password guide**	**Portal lesson**

08 / PRACTICE AND TENANT BOUNDARIES

Separate provider metadata, relationships, membership access, and row policy

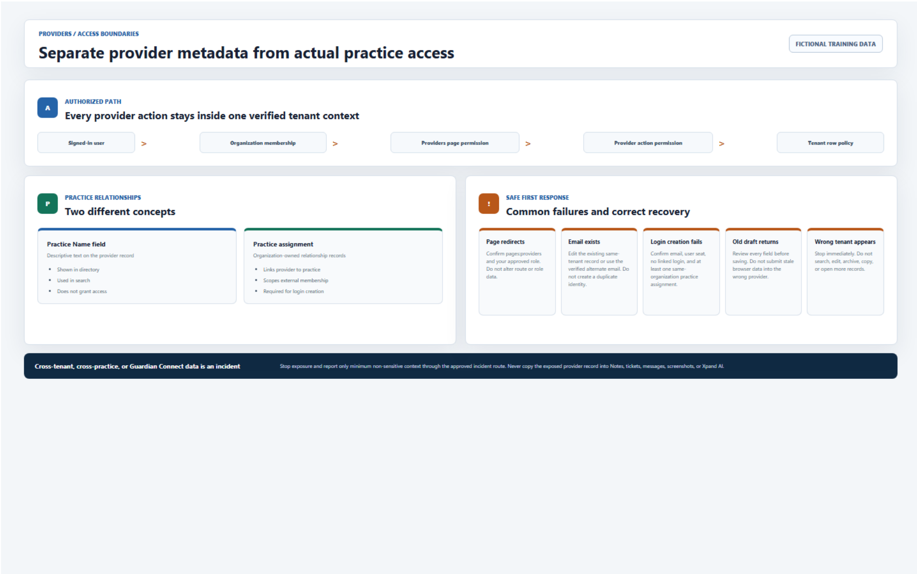

Figure 6. Fictional account-to-tenant authorization path, Practice Name versus practice assignment, troubleshooting, and incident response.

Concept	Stored purpose	Access consequence
Practice Name	Descriptive provider text used in directory and search.	No practice creation, provider link, membership assignment, or access grant.
Practice record	Canonical organization-owned location with contact, identifiers, status, and plan limits.	Defines valid same-organization practice IDs.
Provider-practice	Links provider and practice and can identify a primary relationship.	Supplies provider relationships and login practice inputs.
Membership access	Links external membership to approved practice rows.	Supports practice-scoped external context, not unrelated page permission.
Tenant RLS	Provider read requires organization access; writes require organization plus table-action permission.	Client filters, hidden buttons, and guessed IDs cannot become authorization.
Composite relationship	Provider and practice links carry matching organization IDs.	Cross-organization relationships are rejected.

Open Practices	Next lesson	All resources
Open Practices	**Next lesson**	**All resources**

09 / TROUBLESHOOT

Recover without changing identities, IDs, permissions, or database policy

What you see	Possible reason	Correct first response
Providers redirects	Signed out, wrong account, or missing pages:providers.	Confirm your own account and approved role; do not alter route or role data.
Action missing	Create, update, delete, or super-admin permission is absent.	Respect read-only state and request an approved role review.
Email exists	A provider already uses the normalized email.	Find and edit the correct same-tenant record or verify an approved alternate email.
Old draft returns	Cancel or close retained browser-local add/edit data.	Review every field; do not submit stale data into another provider.
Login disabled	No email, existing user link, or non-super-admin role.	Correct the verified prerequisite or use the authorized super admin.
Login fails	No practice link, duplicate user, exhausted seat, invalid practice, or provisioning error.	Check same-organization assignment, email, seat, and safe backend error.
Archived row absent	Normal list excludes archived providers.	Use approved history/recovery; do not recreate a duplicate.
Delete fails	Role, RLS, or protected relationships rejected permanent deletion.	Prefer archive and review dependencies; never disable constraints or RLS.
Page is stale	Modal open, realtime unavailable, or connectivity problem.	Close safely, refresh once, and compare current values before editing.
Wrong tenant/product	Session, membership, query, policy, cache, deployment, or isolation failure.	Stop; do not search, edit, copy, screenshot, or open more exposed records.

Cross-tenant, cross-practice, or Guardian Connect data is an incident

Report only time, your account, expected organization, route, safe action, and a non-sensitive symptom. Never reproduce the exposed provider name, email, NPI, Tax ID, practice, patient data, screenshot, or copied record.

10 / COMPLETION

Verify safe provider and client directory management

- I can distinguish provider, employee shadow, user account, practice, provider-practice link, and membership practice access.
- I confirm account, organization, route permission, action permission, and approved purpose before directory work.
- I understand normal totals exclude archived providers and describe only the authorized returned list.
- I search with the least-sensitive useful field and know Table and Cards change presentation only.
- I create one verified record, supply required names, avoid duplicates, and review browser-local drafts.
- I keep patient data, credentials, secrets, claims, unrelated clients, other tenants, and Guardian Connect out of provider fields and Notes.
- I verify NPI, Tax ID, license, address, practice type, specialty, software, and status against approved sources.
- I understand linked employee synchronization and review downstream work before inactivation.
- I use Onboarding, Active, Inactive, and Archive correctly and reserve permanent deletion for approved exceptional cleanup.
- I create login only as authorized super admin after email, seat, account, and practice prerequisites pass.
- I handle temporary passwords as secrets and require password-change onboarding.
- I never treat Practice Name text as an access assignment.
- I never fix errors by changing IDs, creating duplicates, borrowing accounts, removing practice scope, disabling RLS, or deleting history.
- I stop and report cross-tenant, cross-practice, or cross-product exposure without opening or copying more data.

> Next lesson
> Continue with Manage practices, locations, and assignments for canonical practice setup, location details, user and provider assignments, plan limits, lifecycle, and tenant-safe access.

Website guide	Open Providers	Next lesson
Website guide	**Open Providers**	**Next lesson**