

# ONLINE SERVICES

and making the most of it

**Practiceplan**  
The business of dentistry

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# A guide to getting the most out of your Online Services

Accessing all of the tools you need to effectively manage your plan has never been easier! Online Services provides real-time access to your patient data, financial statements, cancellation service and much more!

Everything you need to make your plan a success is just a click away with Online Services, saving you time and cutting down on paperwork.

## What Online Services offers you:

- View all of your patients' records in one place
- Keep up to date with any joiners or leavers
- Cut out the paperwork by allowing you to make important changes to your patient records online, including:
- View any outstanding payments
- Find out if you have any patients in query, what the reason is and the actions Practice Plan have taken on your behalf

*Change of address*

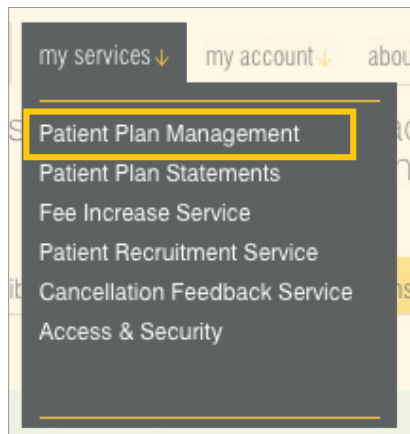
*Change of plan*

*Change of dentist*

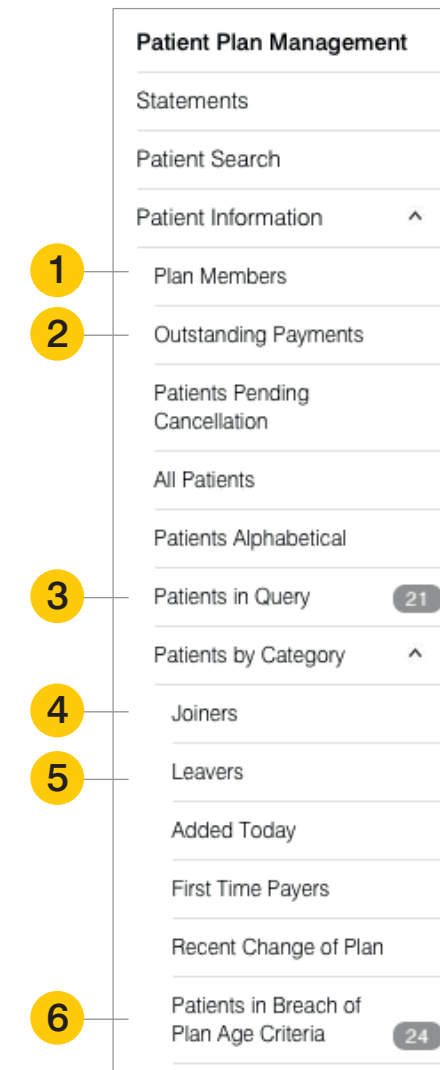
*Cancel a patient's membership plan*

# Patient Plan Management

Patient Plan Management allows you to access all of your patient information in one place. Below are some views you may find useful when it comes to managing your patient plans.



1. This view will allow you to see all your active plan members.
2. Any outstanding payments will show here.
3. If there is an issue with a patient's agreement you can find out the reason here.
4. All your recent *joiners* will be shown here.
5. All your recent *leavers* will be shown here.
6. This will show any patients that are in breach of the age criteria of a plan. This is useful to help you see when a child is reaching the age where they should move onto a teenage or adult plan.



## Patient Plan Management: Changing a patient record

- 7** To make a change to a patient's record, you just need to locate the patient you are looking for by using one of the views listed on the previous page and select the patient from there. The box below will appear with all the patient's details. Then click the 'Update Information' button.

**Mr Matthew Jack**  
Ref: 3216691 **Update Information** Add Additional Patient

Plan Status ? Active ●

Address:  
Mile End Business Park  
Shropshire  
SY10 8GB

Date of Birth/Age:  
10/02/1990 (26)

Parent Guardian:  
Mrs Missy Jack

DENTIST	Morgan, Dexter (Mr)			
PLAN	Child older plan	Code: DT	Plan Fee Discount: 0 %	Price: £5.00

Payment Frequency:  
Monthly

Direct Debit Payer:  
Yes

Pays for Own Plan:  
Yes

Dependants:  
-

Plan Added: ?  
08/06/2014

Plan Ended: ?  
-

- 8** Once you have clicked Update Information, another box will appear and it is here that you can make the changes required to the patient record. Then submit your request.

**New Change Request**

Details For Matthew Jack (3216691)

You can now perform multiple change requests on a patient at the same time, for example a Change of Name and a Change of Address

Request Type:

Change Dentist/Plan	<input type="radio"/> Yes <input checked="" type="radio"/> No
Suspend Patient	<input type="radio"/> Yes <input checked="" type="radio"/> No
Cancel Patient	<input type="radio"/> Yes <input checked="" type="radio"/> No
Change Date of Birth	<input type="radio"/> Yes <input checked="" type="radio"/> No
Change Name	<input type="radio"/> Yes <input checked="" type="radio"/> No
Change Address	<input type="radio"/> Yes <input checked="" type="radio"/> No

Cancel

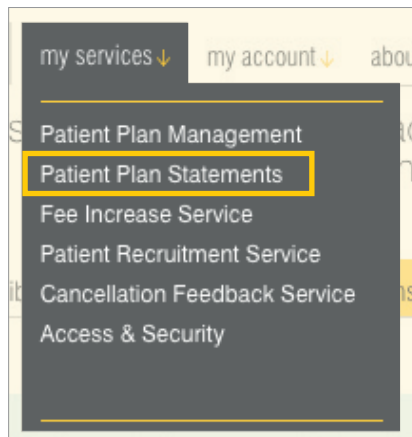
**Submit Request**

Requests made before 3pm are normally actioned the same day

# Monthly Statements

With Online Services, you can easily access your monthly statements all in one place! On the 16th of each month, you'll be able to view your latest statement online.

What's more, all statements are stored in order of month/year, and they even go as far back as 2009! Should you require a paper copy of any statement, you can easily print a copy or download it to your PC.



1

1. All statements are available in PDF format. If you don't have a PDF reader you can simply download one here.

## Statements

Dentist statements are released on the 18th of each month or the next working day. These will appear for download in the table below.

Statements are stored as PDF documents and can be opened with a PDF reader, such as Adobe Reader. Most computers have PDF readers installed, however if you need to install one, we have listed some below.

[Adobe Reader](#)
[Foxit Reader](#)

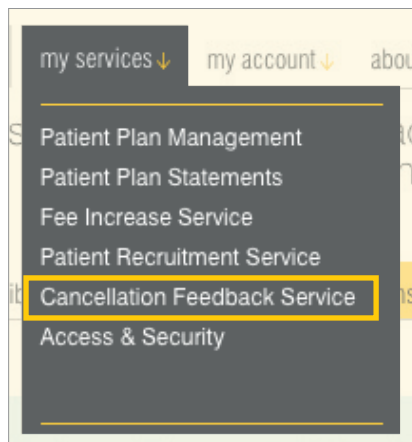
Show 25 entries Search:

Report Date	Dentist	Statement for	Action
18/05/2017	Mr Dexter Morgan	May 2017	<a href="#">Open</a> <a href="#">Save</a>
18/05/2017	Mr Fuzzy Dunlop	May 2017	<a href="#">Open</a> <a href="#">Save</a>
18/04/2017	Mr Dexter Morgan	April 2017	<a href="#">Open</a> <a href="#">Save</a>
18/03/2017	Mr Dexter Morgan	March 2017	<a href="#">Open</a> <a href="#">Save</a>

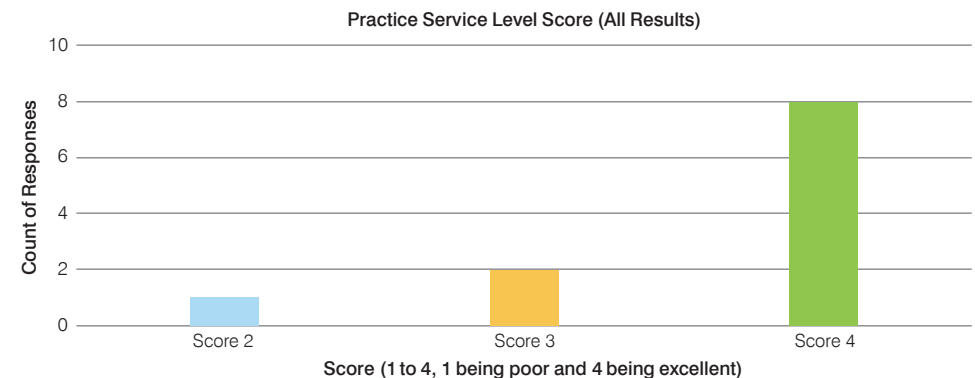
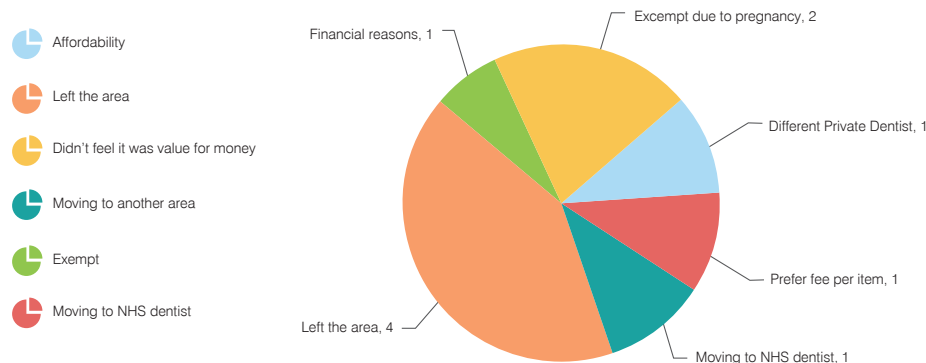
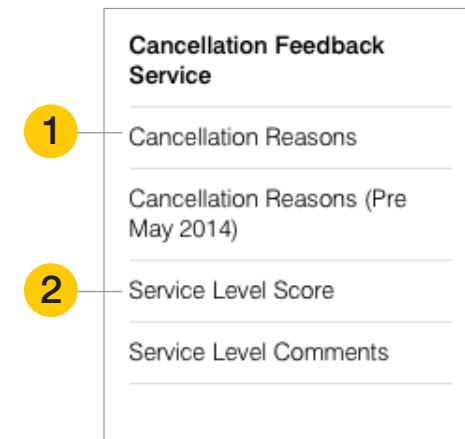
# Cancellation Feedback Service

The Cancellation Feedback Service is designed to help you monitor all patient cancellations. The service allows you to identify any patients that may have cancelled in error. All patient feedback can be found in the Cancellation Reasons section showing you the reasons why patients cancel, including any trends that

may occur. As part of our Feedback Service, we ask patients to provide a service level score for your practice which you are able to view. The scores are represented in handy charts that give you access to your overall score.



1. If we were able to establish a reason for a patient cancelling you will see this here.
2. Here you can view the score that patients have given for the service level they feel they received from their treating dentist. The scores are also presented in a chart to make it easy to see the overall service score of your practice.



# Access and Security

There's no need to worry about unauthorised access to your patient data. With Online Services, you're in full control of who can access what and where. There are three different types of access levels:

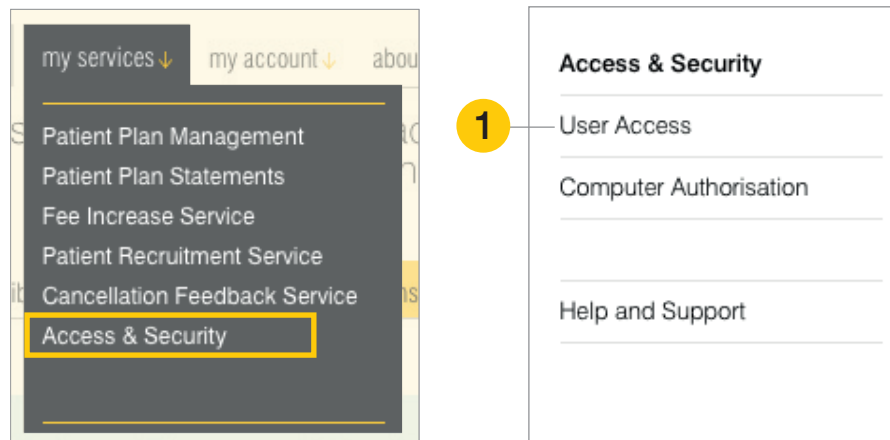
**Owner :** As an owner you automatically have full access to everything Online Services has to offer.

**Admin :** If you have Admin access you are able to manage various informations as well as setting access levels for other online service users.

**Staff Members :** Your access will depend on what the Owner/Admin has delegated to you.

Not only can Owners and Admins control the computers that can access your practice's information, they can also manage the access levels of your staff members, reset passwords and add new staff members.

## Manage staff member's access



- 1 As an Owner/Admin - to set access for a staff member, select them from the list as shown to view their details.

### User Access

Below is your Access Control Panel. It is a simple way to configure user access to your practice's online services.

For further information about User Access Levels and setting data permissions please, download the '[Access All Areas](#)' [guide](#) or visit our [Help and Support](#) pages.

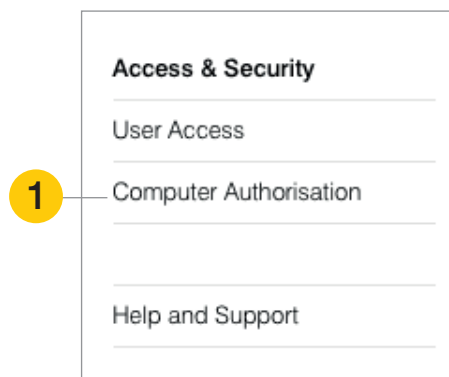
[Add New Person](#)
[Reset](#)
[Save All Changes](#)

Active	New AddPersonFromMigration	Uertype: Staff Member	Last login: Never Logged In	▼
Active	Hans Anderson	Uertype: Admin	Last login: 20/05/2014 14:36:22	▼
Active	Teek Andsecrets	Uertype: Admin	Last login: 03/06/2014 15:06:02	▼
Active	Fortuna Bethesda	Uertype: Staff Member	Last login: Never Logged In	▼
Active	Fluffy Bunlet	Uertype: Owner	Last login: 16/04/2014 17:44:23	▼
Active	Jessica Cawrey	Uertype: Staff Member	Last login: 09/09/2015 12:10:26	▼
Active	Tomos Crowle	Uertype: Staff Member	Last login: Never Logged In	▼



- 2** This tab allows you to grant access to patient-base features of Online Services.
- 3** This tab allows you to grant access to financial statements.
- 4** Staff can be given 'Reader' or 'Editor' access to each of the features of Online Services.
- 5** You can decide if you want to make the person and admin or a staff member.

The screenshot shows a web interface for managing staff member access. At the top, there are buttons for 'Add New Person', 'Reset', and 'Save All Changes'. Below this is a table of staff members. The first row is highlighted in grey and shows 'New AddPersonFromMigration' with 'Ustype: Staff Member' and 'Last login: Never Logged In'. The second row is highlighted in dark grey and shows 'Hans Anderson' with 'Ustype: Admin' and 'Last login: 20/05/2014 14:36:22'. Below the table, there are fields for 'Email:', 'Reference:', 'Username:', and 'Account Status:'. The 'Email:' field contains 'hanstest@205rolandgarros.co.uk'. The 'Reference:' field contains '0020331'. The 'Username:' field contains '0020331'. The 'Account Status:' field contains 'ACTIVE'. Below these fields, there is a section for 'User Access Level:'. It has a dropdown menu set to 'Admin' and a checkbox labeled 'This user can give access to statements'. Below this, there are two tabs: 'Patient Access' and 'Statement Access'. The 'Patient Access' tab is selected. Below the tabs, there is a section titled 'Patient Module Access'. It contains the text 'For each service below, please select the permitted level of access for your user:'. Below this text, there are three rows of services with dropdown menus and 'Show Info' buttons. The first row is 'Patient Recruitment Service' with a dropdown set to 'Reader'. The second row is 'Patient Plan Management' with a dropdown set to 'No Access'. The third row is 'Cancellation Feedback Service' with a dropdown set to 'No Access'. Below the 'Patient Module Access' section, there is a section titled 'Patient Data Access'. It contains the text 'Please select the data access range for the above services. This user can see patient data for the following:'. The interface is annotated with numbered callouts: 2 points to the 'Patient Access' tab, 3 points to the 'Statement Access' tab, 4 points to the 'Patient Module Access' section, and 5 points to the 'User Access Level' dropdown.



- 1 This feature enables you to take control of where your Online Services can be accessed.

If you select 'Enable Computer Authorisation' an Owner or Admin must log into Online Services before that PC or laptop can be used by other staff members.

The Owner or Admin must then select 'Authorise this PC' under 'my account' menu at the top right of the page.

## Computer Authorisation

Computer Authorisation is a security function. If enabled, it allows an Owner or Admin\* to control the computers that can access your practice's online services.

For further information on what the Computer Authorisation security function is, how it works and the consequences of enabling or disabling it, please refer to the [Help and Support](#) pages.

When the Computer Authorisation security function has been enabled then either an Owner or Admin must log in to [www.practiceplan.co.uk](http://www.practiceplan.co.uk) on the specific computer they wish to authorise to access your practice's online services.

Once logged in, they must go to the 'my account' section and press the link called 'Authorise this PC'. The authorisation will have been activated if the link changes to 'De-authorise this PC'. This specific computer will then be set up so that [www.practiceplan.co.uk](http://www.practiceplan.co.uk) will recognise it as an authorised computer and grant user access to your practice's online services.

\*Enabling or disabling the Computer Authorisation security function can only be authorised by an Owner.

The below banner will indicate if your practice's online services has enabled or disabled the Computer Authorisation security function:

Computer Authorisation has been disabled for your practice online services

Please note – If the Computer Authorisation security feature is disabled, then dental team users with granted permissions to view your practice online services, will be able to access them from any computer. If enabled, but a computer or web browser has been set up to remove cookies as part of a maintenance programme, an Admin or Owner will need to log into the website of each computer(s) requiring authorisation to re-authorise it each time the process has run.

Enable Computer Authorisation

## Add New Person\*

- 1 Adding a new staff member to Online Services is easy. All you need to do is click the 'Add New Person' button as shown below. A new window will pop up and you just need to complete the required details and submit. Please remember to make a note of the login details!

Below is your Access Control Panel. It is a simple way to configure user access.

For further information about User Access Levels and setting data permissions [guide](#) or visit our [Help and Support](#) pages.

**Add New Person**

Active	New AddPersonFromMigration	Usertype: Staff Member
Active	Hans Anderson	Usertype: Admin

### Add New Person

**Add Staff**

Please complete the required fields below to add a new person to your practice. If the new person is a Dentist and wants to manage their own Membership Plan, please contact our Customer Service team on 01691 684120.

**Job Role \***

Assistant Practice Manager

**Job Title**

**Title \***

Miss

**Forename \***

**Surname \***

\* Indicates a Required Field

**Submit**

\* Please note that dentists cannot be added via Online Services. Please contact our Head Office support team on 01691 684120 who will be able to arrange this.

# Troubleshooting

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## I've forgotten my password.

### For Owners/Admins

To reset an Owner or Admin password, click on the login button at the top right of the screen and you will see the option for forgotten password.

Once you've entered your username and pressed submit, an email will be sent to your registered email address. Follow the instructions in this email to reset your password.

### For Staff Members

If your access is only that of a Staff Member, an Owner or Admin will need to reset your password. To do this the Owner or Admin needs to log into Online Services and select 'Access and Security' from the 'my services' menu.

Here they will need to view the user access and select the relevant staff member from the list. Once the staff member has been selected, you will see an 'actions' button which gives the option to reset that staff member's password.

## How do I change my username/password?

To change your username to something more memorable, simply log into Online Services and click on 'my account' and select 'change username' from the list.

## I can't access the page I need?

All PCs accessing Online Services need to be authorised by the practice owner. If you're using a PC which hasn't been authorised, a message of 'page not accessible' will appear.

In order to authorise the PC, simply follow the instructions in the 'Computer Authorisation' section of this guide.

**IF YOU ARE EXPERIENCING ANY PROBLEMS,**

**PLEASE CALL 01691 684120**

**WE ARE OPEN 9.00 AM - 5.00 PM MONDAY TO FRIDAY**

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