

# ONLINE PATIENT REGISTRATION

Getting started

**Practiceplan**  
The business of dentistry

# A guide to Online Patient Registration

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Online Patient Registration is a simple and instant way to register new patients to your membership plans. We have designed the system to be as easy to use and straightforward as possible.

This guide will give you some pointers on what the system can be used for and what you will need to consider when using it.

## ➤ This service allows you to:

- Register a new patient to your membership plan
- Link a new patient to an existing plan member, allowing you to easily set up single group Direct Debit payments
- Keep track of the status of all online patient applications.

## Top Tip!

For quick access to register a patient online, save the following URL as a bookmark:

**[onlineservices.practiceplan.co.uk/new-patient](https://onlineservices.practiceplan.co.uk/new-patient)**

## ➤ Before you get started... Before processing any new patient application, here are a few important things to know:

### Do's

- Present the patient with a copy of the Plan Terms and Conditions, Worldwide Dental Emergency Assistance Scheme handbook and Practice Plan's Privacy Notice to read at the start of the process.
- Ensure that the patient has bank details to hand to set up their payment, and that they're authorised to set up Direct Debits from that account.
- When adding an additional patient to an existing plan member, ensure that the existing member is present and authorises the increase to the Direct Debit.
- When you see a statement marked with , this must be read to the patient.

### Don'ts

- Please do not complete an application if the patient isn't present in the practice. The patient must agree to each stage of the process in person.
- Please do not ask the patient to complete a paper Agreement form and then you transcribe the contents into Online Patient Registration at a later time. This can lead to major errors and disruption to patients, such as the wrong bank account details being used against the wrong patient.

# Application dashboard

Your application dashboard is where you can manage all your patient applications. Here is a run-through of what is accessible from this dashboard:

1. To access the dashboard, click on 'Patient Plan Applications' under the 'my services' drop-down menu.
2. The dashboard allows you to view all applications by status. The statuses are:
  - **Draft** – this application has been started and saved for future completion
  - **Processing** – this application has been completed and is with Practice Plan to be set up
  - **Completed** – this application has been fully completed and the patient is now active
  - **Archived** – you have the option to archive any pending applications should the patient decide not to proceed with the plan.
3. Clicking on the patient application will allow you to view the details and take further action, such as continue a draft application or archive an application.
4. Click on 'Add patient to plan' to begin a new patient application.

The screenshot shows the Practiceplan dashboard interface. At the top, there is a navigation bar with 'my services', 'my account', 'about', 'contact', and 'home'. Below this is the Practiceplan logo and tagline 'The business of dentistry'. A secondary navigation bar includes 'attract & retain patients', 'increase treatment uptake', 'manage your practice', and 'save time & money', along with 'membership' and 'resource library'. There are buttons for 'patient plans' and 'patient finance'. The main heading is 'All Pending Online Applications' with an 'Add patient to plan' button. A sidebar on the left lists application statuses: Draft (7), Processing (13), Completed, and Archived (3), with an 'Add patient to plan' and 'Help' option. A key indicates status colors: DRAFT (grey), WITH PATIENT (yellow), PROCESSING (blue), COMPLETE (green), and APPLICATION ALERTS (red). A search bar and 'Show 10 entries' are present. The main table lists applications with columns for Status, Date, Lead Patient, Plan, and Plan Price.

Status	Date	Lead Patient	Plan	Plan Price
Draft	26/04/2017	Crichton, Al (Mr)	Fake plan no ins	16.25
Draft	09/05/2017	Crichton, Caroline (Mr)	Infinity Plan	1.01
Draft	02/05/2017	D'Arcy, Andrew (Mr)	Dental plan	10.00
Draft	05/05/2017	Hatton, Richard (Ven)	Infinity Plan	1.01
Draft	20/04/2017	Northall, Becky (Miss)	Fake plan no ins	16.25
Draft	27/04/2017	Scott, Matt (Mr)	Fake with ins	37.87
Processing	10/05/2017	Crichton, Al (Mr)	Fake with ins	37.87
Processing	09/05/2017	Crichton, Alasdair (Mr)	Fake plan no ins	20.00

## Top Tip!

Visit your dashboard regularly and keep applications up to date. Move any old 'Draft' applications to 'Archive' to keep the 'All Pending' view fresh.

# Registering a new patient

1. In the 'Patient Information' section all fields are mandatory, apart from the 'Your unique patient ID'. This field allows you to enter the practice's patient ID if the patient previously attended as a non-plan patient.
2. We have the option to send registration confirmation and Scheme documents by email. Simply capture the patient's email and have them agree to the paperless option during the payment process.
3. Upon entering the patient's information, you can perform a duplicate check to make sure that patient isn't already registered to a plan at your practice. This feature uses the patient's information to check your current plan patient base.

If you are currently undertaking an active recruitment campaign (e.g. NHS conversion or a switch from another plan provider), the duplicate check will also look if the patient is included in the campaign. If they are included, you should select the patient and click continue to use the pre-loaded patient recruitment data.

4. The commencement date of the plan will default to the next available month, but you have the option to back-date (up to one month in the past) or forward-date (up to six months in the future) when the patient starts the plan.
5. The patient has the option to add additional patients to their application – this could be a spouse or child. The initial patient will become the 'lead patient' of the application, with additional patients becoming 'dependants'. If adding a parent and child together, please ensure you add the parent first.

Once you've added all patients to the application, clicking 'Continue' will take you through to the Payment screen, where you will set up the Direct Debit.

**Practiceplan** PATIENT & PLAN > ADDITIONAL PATIENTS > PAYMENT - COMPLETE

## Patient and Plan Information

**1** Patient Information

Mr

First name: Dave Surname: Smith

Date of birth: 01/01/1972 Your unique patient ID (Optional):

**2** Contact Details

Email address: davesmith@practiceplan.co.uk  No email address available

Phone number: 07971 123456

Mailing address: Search by postcode: 10 Cambrian Works Galsgreen Road

**3** Check for duplicate

**4** Commencement date

The commencement date defaults to the next available month for collection. Please note that choosing an alternative month may result in back payments for the patient.

1st June 2019

Cut off for next collection: 22nd May  
First payment: 10th June

**5** Back Add additional patient OR Continue

**6** Summary:

<b>Mr Dave Smith</b>	
Initial Fee	£9.50
Monthly Payment	£15.50
<b>Plan start date</b> 1st June 2019	
<b>First payment total</b>	<b>£25.00</b>
Taken on or around the 10th June	
<b>Then monthly payments of</b>	<b>£15.50</b>
ⓘ Details of fee increases will show on the payment page.	

**7** Cancel Application Save & Close

6. The summary on the right of the page will give a running total of the application, including total payment amount and any additional patients.
7. If the patient doesn't wish to continue with the application, you can cancel it or save it for future completion. If saved, the application will become 'Draft' in the dashboard.

# Processing payments

1. If the selected plan is due to have a change to its fee over the next two months, it will be shown in the summary. Please ensure you advise the patient of any planned fee changes.

2. Please read the displayed questions to the patient – these ensure they are happy for a Direct Debit to be set up and they are authorised to do so on the bank account provided.

If the patient is happy to 'go paperless', the initial correspondence to confirm the set up of the plan will be sent by email. Going forward, wherever possible, Practice Plan will send future plan correspondence by email.

3. In the 'Payment details' section, you can set the patient's Direct Debit payment frequency – either monthly or annually.

4. The key documents that a new plan patient must read and understand are shown here. You can use the hard copies you have in the practice, or click 'Print' to open the PDFs and print copies yourself.

Before completing the registration, you must tick the box to confirm the patient has read and understood the documents.

The patient will be sent a copy of all these documents by post or email, depending on their contact preference

5. Before authorising the payment, read the final check to the patient to make sure they're happy to proceed with the Direct Debit.

The screenshot shows the 'Practiceplan' 'Payment' completion screen. At the top, the breadcrumb trail reads: 'PRACTICE PLAN > ADDITIONAL PATIENTS > PAYMENT > COMPLETE'. The main heading is 'Payment'.

**2** points to the 'Account holder questions' section, which contains three questions with checkboxes:

- Ensure you read any passage marked [ ] to the patient.
- Can the practice complete on patient's behalf? (with a sub-question about Direct Debit instructions)
- Can patient authorise payment? (with a sub-question about named holder permission)
- Go paperless? (with a sub-question about future correspondence)

**3** points to the 'Payment details' section, which includes:

- Payment frequency: Monthly (dropdown)
- Name of account holder: Mr Dave Smith
- Sort code: 00-00-00
- Account number: 12345678

**4** points to the 'Key documents' section, which lists three documents with 'Print' links:

- Worldwide Dental Emergency Assistance Scheme Handbook v2.0
- Privacy Notice v2.0
- Terms and Conditions v1.0

Below the list is a checkbox: 'I confirm the patient has read and understands the documents.'

**5** points to the 'Final Check' section, which contains a summary statement: 'By allowing me to authorise this payment, you agree to pay £24.50 initial payment followed by ongoing monthly payments of £17.46.'

At the bottom right, there is an 'Authorise payment' button and a 'Back' link.

On the right side of the screen, there is a summary box for 'Mr Dave Smith' with a 'PAY MONTHLY' dropdown. It lists:

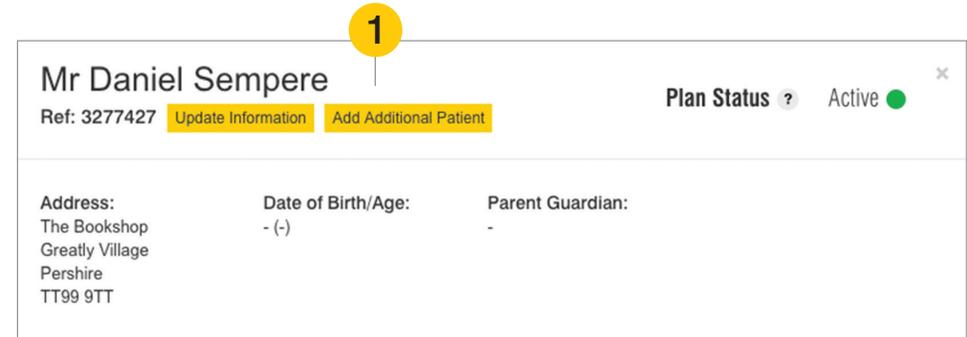
- Initial Fee: £9.50
- Monthly Payment: £15.00
- Fee set to change to £17.46 in August 2019
- Plan start date: 1st July 2019
- First payment total: £24.50
- Taken on or around the 8th July
- Then monthly payments of: £17.46
- Will change to £17.46 in August 2019

# Adding a new patient to an existing patient

The system will allow you to add new additional patients to plan patients who are already registered to the practice. You will be able to link the records and add the new patient to the already existing Direct Debit payment.

**It is essential that the existing plan patient has authorised the addition of the new patient to their Direct Debit.**

Simply find the existing patient's record via Patient Search in Patient Plan Management. In the existing patient's record, click on 'Add Additional Patient'. This will open up the Patient and Plan Information screen to allow you to add the patient. Once completed, there's no need to enter bank details as these are already present in the existing patient's record.



1

Mr Daniel Sempere

Ref: 3277427 [Update Information](#) [Add Additional Patient](#)

Plan Status ? Active ●

Address:	Date of Birth/Age:	Parent Guardian:
The Bookshop Greatly Village Pershire TT99 9TT	- (-)	-

# Giving your staff access to register patients online

Making sure that the correct people in your practice have access to the system is essential. It would be useful for all administrative staff within the practice to be given access, especially your front desk team.

## To make sure that the correct access is given, simply:

1. Select 'Access & Security' under the 'my services' dropdown menu.
2. Click on 'User Access' to open your practice staff list.
3. In order for staff to use this system, they must have 'Reader' or 'Editor' rights under Patient Plan Management. Make sure you save any changes you make by clicking 'Save All Changes'.
4. If a member of staff doesn't appear in the list, you can add their record by clicking 'Add New Person' and completing the form.

The screenshot shows the Practiceplan 'User Access' page. At the top, a yellow circle with the number '1' points to the 'my services' dropdown menu. Below the navigation bar, a yellow circle with the number '2' points to the 'User Access' link in the left-hand menu. A yellow circle with the number '4' points to the 'Add New Person' button. A yellow circle with the number '3' points to the 'Patient Module Access' section, specifically to the 'Reader' dropdown menu for the 'Patient Recruitment Service'.

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## User Access

Access & Security  
**User Access**  
Computer Authorisation  
Help and Support

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

Access Level	Name	Usertype	Last login	Actions
No Access	New AddPersonFromMigration	Staff Member	Never Logged In	⌵
No Access	Hans Anderson	Admin	20/05/2014 14:36:22	⌶

Email: hanstest@205rolandgarros.co.uk [?] Actions -  
Reference: 0020331  
Username: 0020331  
Account Status: Not Hub User  
User Access Level: [?] Admin [⌵]  This user can give access to statements

Patient Access | Statement Access | Medenta Access

### Patient Module Access [?]

For each service below, please select the permitted level of access for your user:

Service	Access Level	Show Info
Patient Recruitment Service	Reader [⌵]	Show Info
Patient Plan Management	Editor [⌵]	Show Info
Cancellation Feedback Service	No Access [⌵]	Show Info

**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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