ONLINE PATIENT REGISTRATION

Getting started

Practiceplan
The business of dentistry

A guide to Online Patient Registration

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

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:

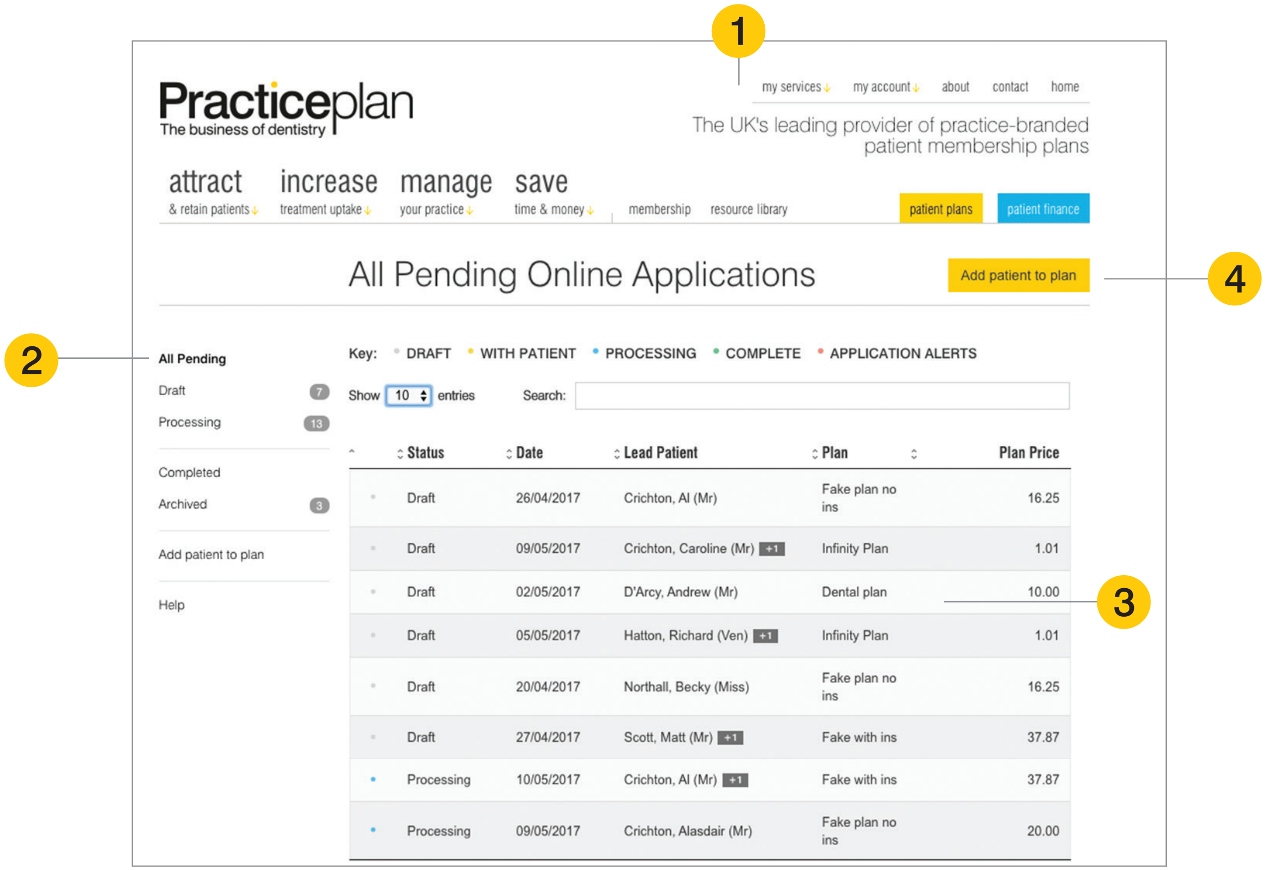
1. To access the dashboard, click on 'Patient Plan Applications' under the 'my services' drop-down menu.

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.



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.

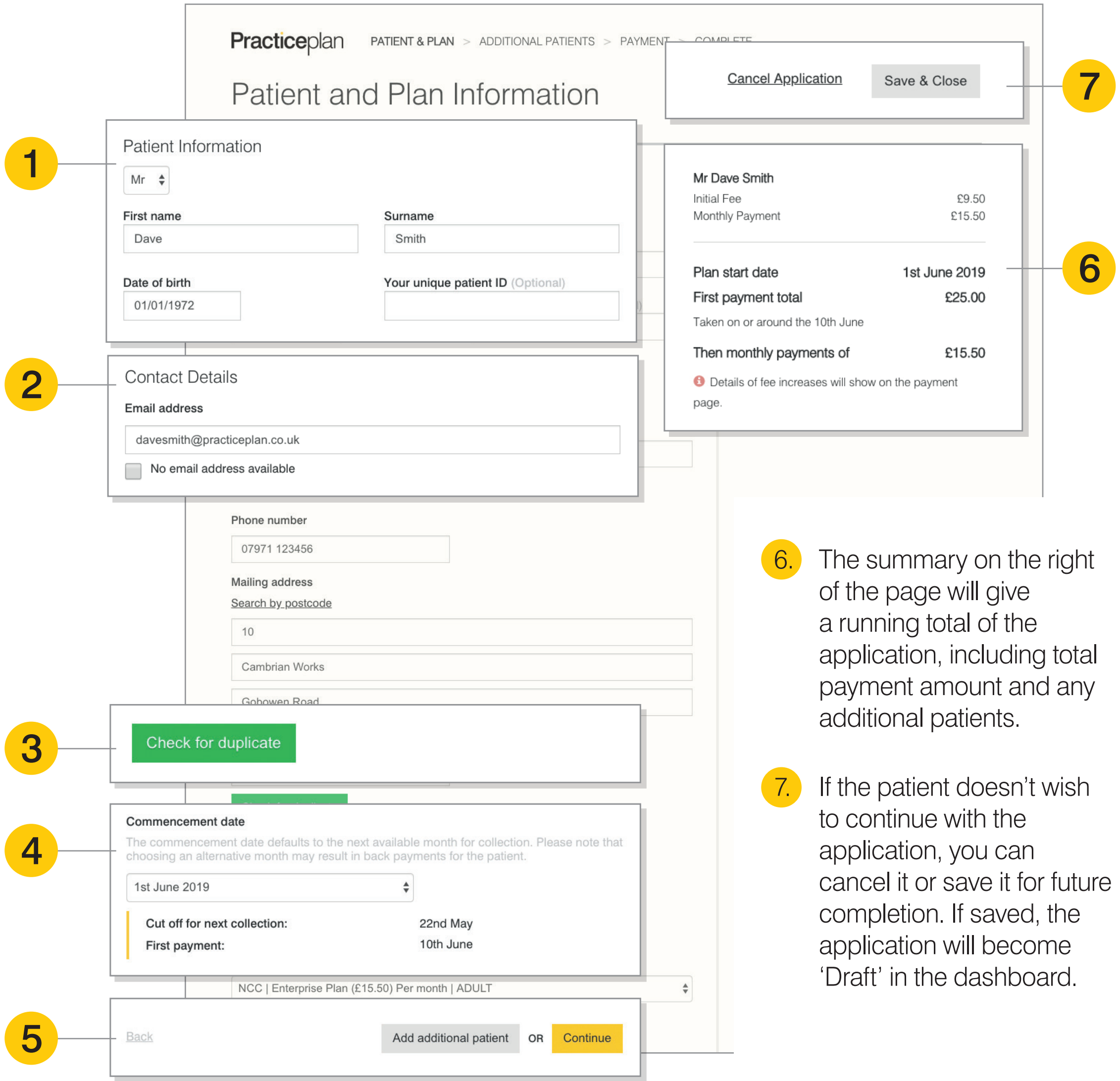
3. Upon entering the patient’s information, you can perform a duplicate check to make sure that patient isn’t already registered to a plan at your practice. This feature uses the patient’s information to check your current plan patient base.

   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.



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.

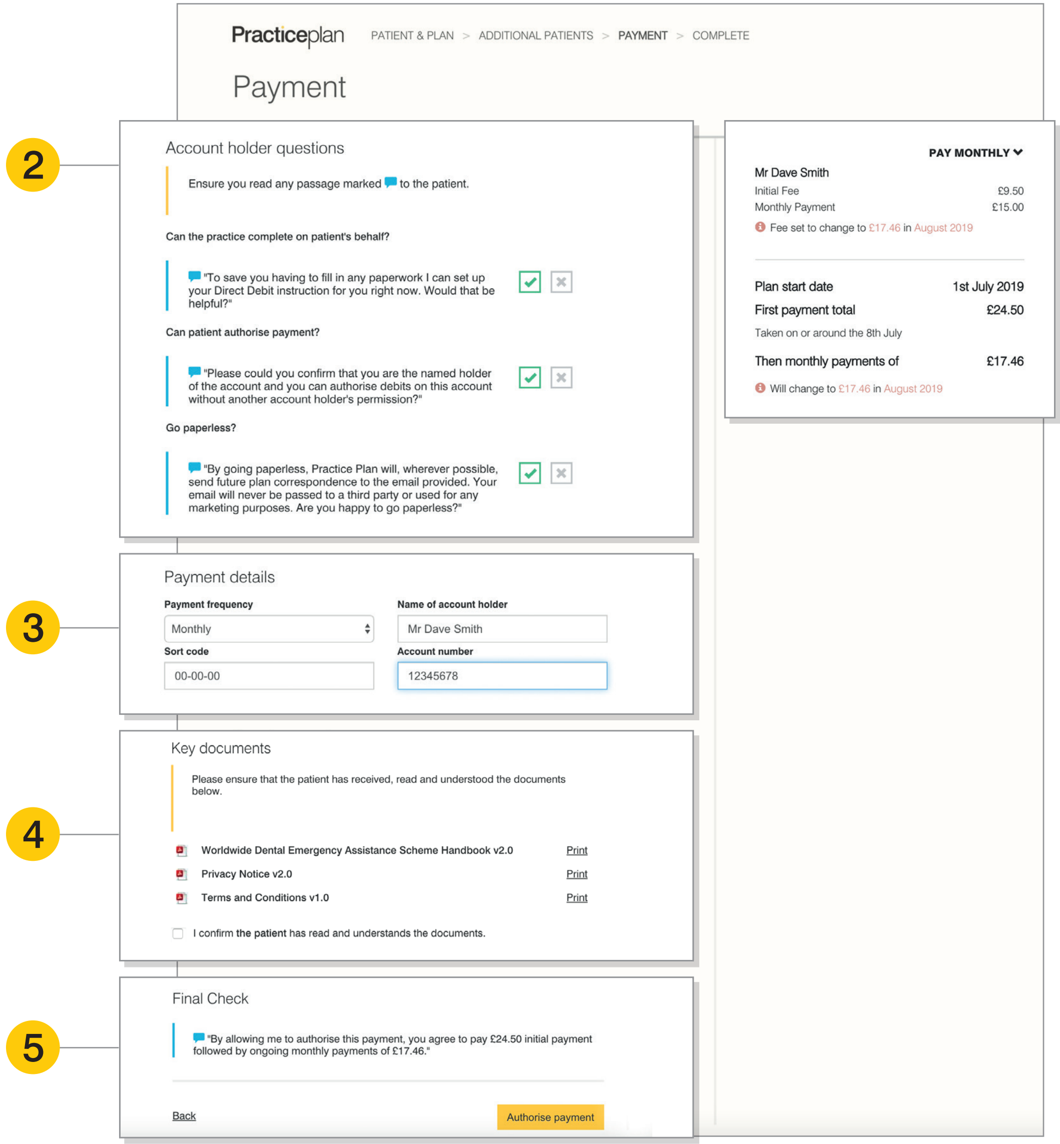
3. In the 'Payment details' section, you can set the patient's Direct Debit payment frequency – either monthly or annually.

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.

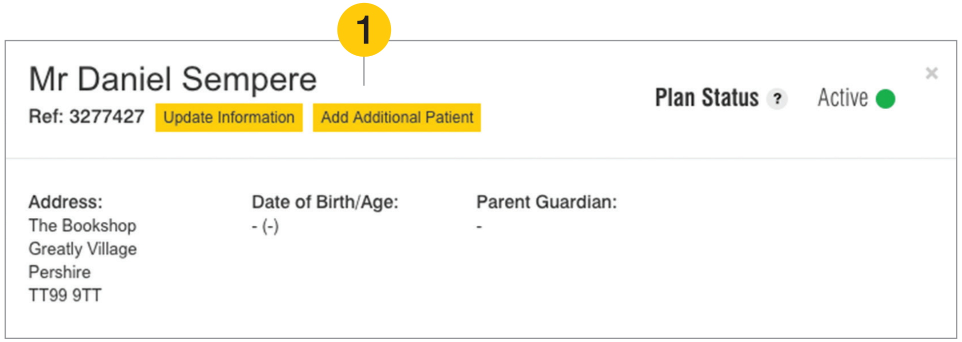


Adding a new patient to an existing patient

The system will allow you to add new addtional 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.

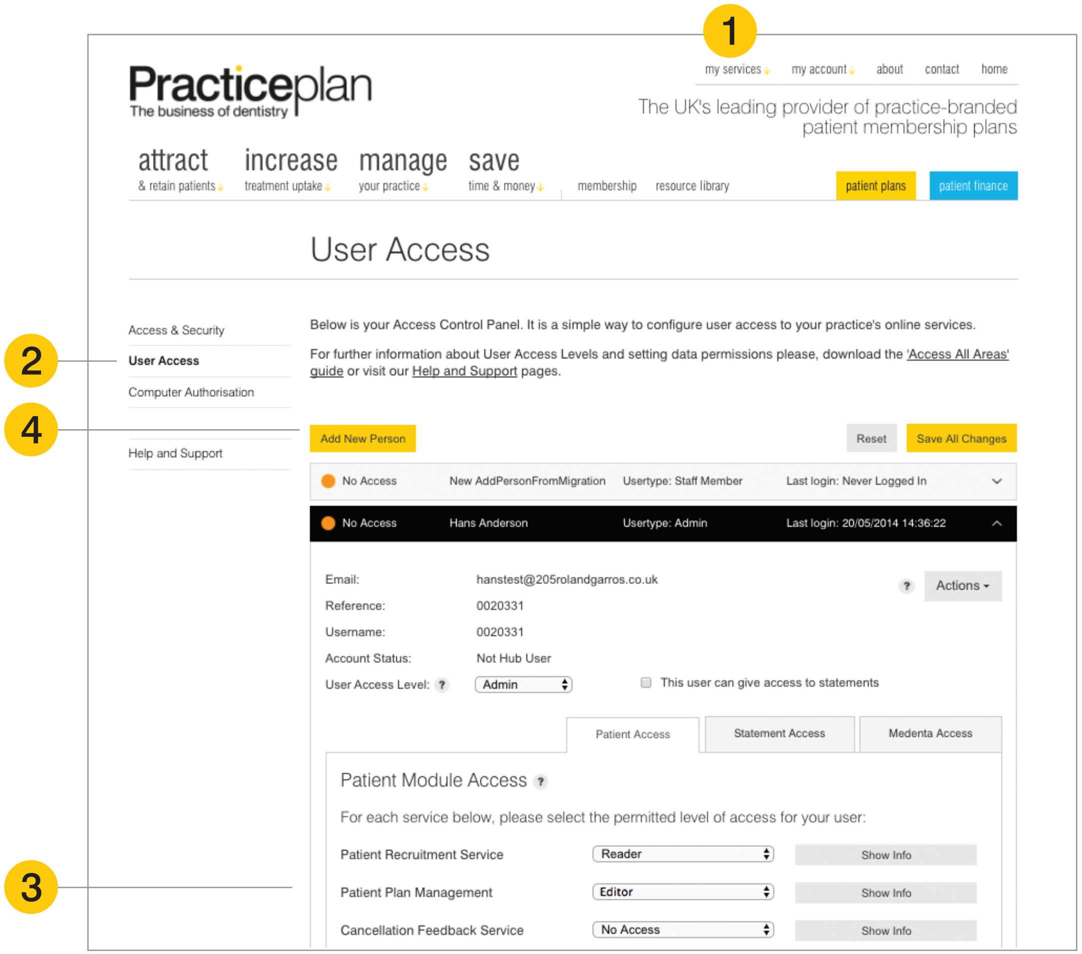


Giving your staff access to register patients online

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.



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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