

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!


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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.

The screenshot shows the Practiceplan dashboard interface. At the top, there's 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', 'increase', 'manage', and 'save', each with a sub-menu. 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), along with 'Add patient to plan' and 'Help'. The main content area features a table of applications with columns for Status, Date, Lead Patient, Plan, and Plan Price. A key at the top indicates status colors: DRAFT (yellow), WITH PATIENT (orange), PROCESSING (blue), COMPLETE (green), and APPLICATION ALERTS (red). A search bar and a 'Show 10 entries' dropdown are also present.

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.

The screenshot shows the 'Practiceplan' interface for 'Patient and Plan Information'. The breadcrumb trail at the top is 'PRACTICEPLAN > PATIENT & PLAN > ADDITIONAL PATIENTS > PAYMENT > COMPLETE'. The form is divided into several sections:

- 1. Patient Information:** Includes a dropdown for 'Mr', text boxes for 'First name' (Dave) and 'Surname' (Smith), a 'Date of birth' (01/01/1972), and a 'Your unique patient ID (Optional)' field.
- 2. Contact Details:** Includes an 'Email address' field (davesmith@practiceplan.co.uk) and a checkbox for 'No email address available'. Below this is a 'Phone number' field (07971 123456) and a 'Mailing address' section with 'Search by postcode' (10), 'Cambrian Works', and 'Gobswen Road'.
- 3. Check for duplicate:** A green button.
- 4. Commencement date:** A dropdown menu showing '1st June 2019'. Below it, 'Cut off for next collection:' is '22nd May' and 'First payment:' is '10th June'.
- 5. Bottom navigation:** Includes a 'Back' button, 'Add additional patient' button, 'OR', and a 'Continue' button.
- 6. Summary panel (right):** Displays 'Mr Dave Smith' with 'Initial Fee' (£9.50) and 'Monthly Payment' (£15.50). It also shows 'Plan start date' (1st June 2019), 'First payment total' (£25.00), and 'Then monthly payments of' (£15.50). A note states: 'Details of fee increases will show on the payment page.'
- 7. Top right actions:** Includes 'Cancel Application' and 'Save & Close' buttons.

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' screen. At the top, a breadcrumb trail reads: 'PATIENT & PLAN > ADDITIONAL PATIENTS > PAYMENT > COMPLETE'. The main heading is 'Payment'.

Callout 1: Points to the 'Account holder questions' section. It contains three questions, each with a 'Yes' (green checkmark) and 'No' (red X) button:

- Ensure you read any passage marked [blue icon] to the patient.
- Can the practice complete on patient's behalf? (Note: "To save you having to fill in any paperwork I can set up your Direct Debit instruction for you right now. Would that be helpful?")
- Can patient authorise payment? (Note: "Please could you confirm that you are the named holder of the account and you can authorise debits on this account without another account holder's permission?")
- Go paperless? (Note: "By going paperless, Practice Plan will, wherever possible, send future plan correspondence to the email provided. Your email will never be passed to a third party or used for any marketing purposes. Are you happy to go paperless?")

Callout 2: Points to the 'Payment details' section. It includes:

- Payment frequency:** A dropdown menu set to 'Monthly'.
- Sort code:** A text box containing '00-00-00'.
- Name of account holder:** A text box containing 'Mr Dave Smith'.
- Account number:** A text box containing '12345678'.

Callout 3: Points to the 'Key documents' section. It 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.'.

Callout 4: Points to the 'Final Check' section. It contains a message: "By allowing me to authorise this payment, you agree to pay £24.50 initial payment followed by ongoing monthly payments of £17.46." Below this is a 'Back' link and an 'Authorise payment' button.

Callout 5: Points to a summary box on the right side of the screen. It is titled 'PAY MONTHLY' and shows details for 'Mr Dave Smith':

- 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:

The Bookshop
Greatly Village
Pershire
TT99 9TT

Date of Birth/Age:

- (-)

Parent Guardian:

-

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' control panel. Callout 1 points to the 'my services' dropdown menu in the top navigation bar. Callout 2 points to the 'User Access' link in the left-hand sidebar. Callout 3 points to the 'Patient Module Access' section at the bottom of the page, which allows setting permissions for various services. Callout 4 points to the 'Add New Person' button at the top of the user list.

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my services ▾ my account ▾ about contact home

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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](#)

No Access	New AddPersonFromMigration	Usertype: Staff Member	Last login: Never Logged In	▾
No Access	Hans Anderson	Usertype: Admin	Last login: 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:

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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