

ONLINE SERVICES

Access and user guide

Practiceplan
The business of dentistry

This mini guide is here to support you to ensure that all members of your practice are set up correctly on Online Services. It covers the following:

- Checking who at the practice has access
- Adding new Online Services users
- Activating a member of staff without access to Online Services.
- Finding a lost username
- Resetting passwords.

Enabling each member of staff at your practice to be set up with the correct level of access will provide them with login details so that they can take advantage of our Resource and Learning Hub*

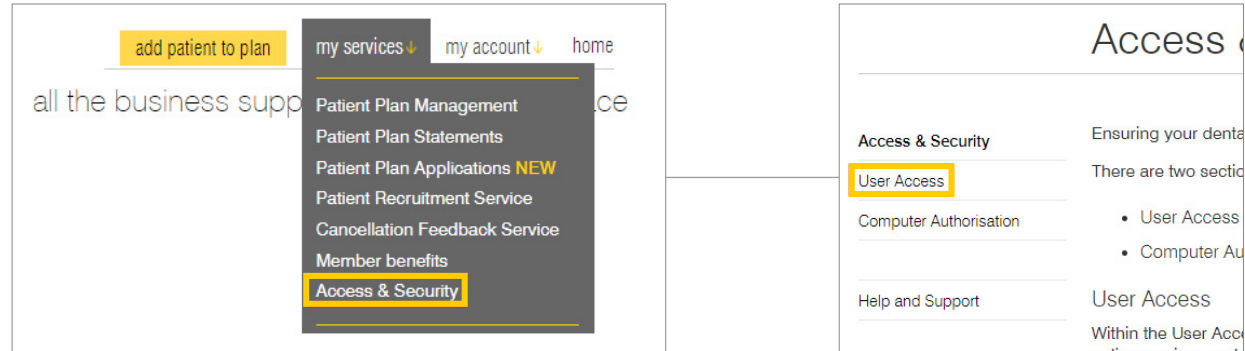
<https://hub.practiceplan.co.uk>

The exclusive, 'members only' hub is packed full of plan membership training and business support to help you attract and retain patients, maximise the potential of your team and build a profitable and sustainable practice.

*The Resource and Learning Hub contains verifiable CPD learning modules and user details will automatically pull through onto auto-generated CPD certificates upon completion. Therefore, it is important that each member of staff has their own login to reflect CPD requirements as required and applicable.

Checking who at the practice has access

To check who at the practice has access to Online Services, you need to go to the User Access page in Access & Security.



The Access Control Panel will list all of your members of staff on Practice Plan's system, and will show if they have access and, if so, what level of access they have.

The status on the left shows if a member of staff is active on Online Services, or if they have no access.

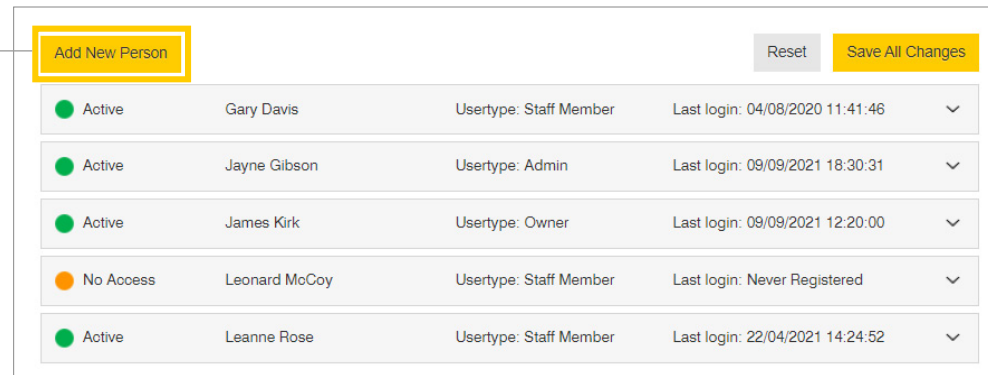
Add New Person		Reset	Save All Changes
Active	Gary Davis	Usertype: Staff Member	Last login: 04/08/2020 11:41:46
Active	Jayne Gibson	Usertype: Admin	Last login: 09/09/2021 18:30:31
Active	James Kirk	Usertype: Owner	Last login: 09/09/2021 12:20:00
No Access	Leonard McCoy	Usertype: Staff Member	Last login: Never Registered
Active	Leanne Rose	Usertype: Staff Member	Last login: 22/04/2021 14:24:52

The 'Usertype' shows what level of access that user has.

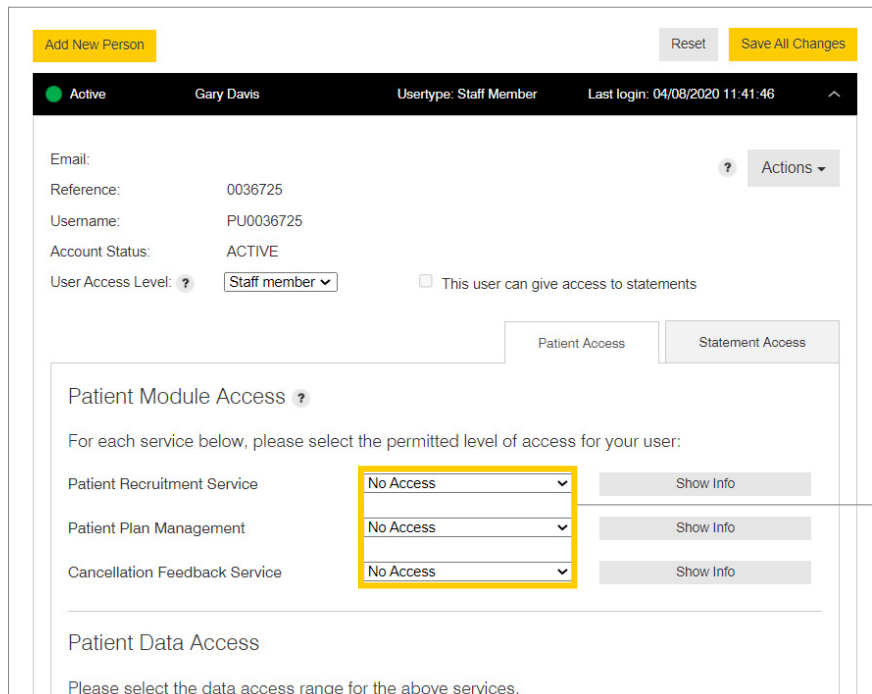
Adding new Online Services users

To add new users to Online Services, simply click 'Add New Person' and complete their personal details.

Upon submitting the new user's details, their username and password will be displayed on-screen – make sure you make a note of them.



Active	Gary Davis	Uertype: Staff Member	Last login: 04/08/2020 11:41:46	▼
Active	Jayne Gibson	Uertype: Admin	Last login: 09/09/2021 18:30:31	▼
Active	James Kirk	Uertype: Owner	Last login: 09/09/2021 12:20:00	▼
No Access	Leonard McCoy	Uertype: Staff Member	Last login: Never Registered	▼
Active	Leanne Rose	Uertype: Staff Member	Last login: 22/04/2021 14:24:52	▼



Add New Person Reset Save All Changes

Active Gary Davis Uertype: Staff Member Last login: 04/08/2020 11:41:46

Email: ? Actions ▼

Reference: 0036725

Username: PU0036725

Account Status: ACTIVE

User Access Level: ? Staff member ▼ This user can give access to statements

Patient Access Statement Access

Patient Module Access ?

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

Patient Recruitment Service	No Access ▼	Show Info
Patient Plan Management	No Access ▼	Show Info
Cancellation Feedback Service	No Access ▼	Show Info

Patient Data Access

Please select the data access range for the above services.

Once the user is set up and visible in the Access Control Panel, open their record to set their various access levels to patient data and financial statements.

Setting up a user with 'no access' to Online Services

The screenshot shows a user management interface. At the top, there is a list of users:

Status	Name	Uertype	Last login
Active	Jayne Gibson	Admin	09/09/2021 18:30:31
Active	James Kirk	Owner	09/09/2021 12:20:00
No Access	Leonard McCoy	Staff Member	Never Registered

Below the list, the details for Leonard McCoy are shown:

Email: [redacted] ? Actions ▾
Reference: 0044247
Username: [redacted]
Account Status: Not Hub User
User Access Level: ? Staff member ▾ This user can give access to statements

Buttons: Patient Access, Statement Access

For a user shown as having no access, you can activate their account by clicking 'Activate Account' under the 'Actions' button on their record.

This will set up their account and display login details on-screen – make sure you make a note of them.

Once the user is set up and visible in the Access Control Panel, open their record to set their various access levels to patient data and financial statements.

The screenshot shows the user management interface for Gary Davis:

Buttons: Add New Person, Reset, Save All Changes

User details:

Status: Active
Name: Gary Davis
Uertype: Staff Member
Last login: 04/08/2020 11:41:46

Fields:

Email: [redacted] ? Actions ▾
Reference: 0036725
Username: PU0036725
Account Status: ACTIVE
User Access Level: ? Staff member ▾ This user can give access to statements

Buttons: Patient Access, Statement 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	No Access	Show Info
Patient Plan Management	No Access	Show Info
Cancellation Feedback Service	No Access	Show Info

Patient Data Access

Please select the data access range for the above services.
This user can see patient data for the following:

All dentist(s) *

Finding a lost username

A user's username can be found on their record in the Access Control Panel. Simply click on their name to open their record.

The screenshot displays the 'Add New Person' interface in the Access Control Panel. At the top, there are buttons for 'Add New Person', 'Reset', and 'Save All Changes'. Below this is a header bar with a green status indicator, the name 'Gary Davis', 'User type: Staff Member', and 'Last login: 04/08/2020 11:41:46'. The main form contains the following fields:

- Email: (empty)
- Reference: 0036725
- Username: **PU0036725** (highlighted in a yellow box)
- Account Status: ACTIVE
- User Access Level: (dropdown menu)
- This user can give access to statements

Below these fields are two tabs: 'Patient Access' (selected) and 'Statement Access'. Under 'Patient Access', there is a section titled 'Patient Module Access' with the instruction: 'For each service below, please select the permitted level of access for your user:'. It lists three services, each with a 'No Access' dropdown and a 'Show Info' button:

- Patient Recruitment Service: No Access
- Patient Plan Management: No Access
- Cancellation Feedback Service: No Access

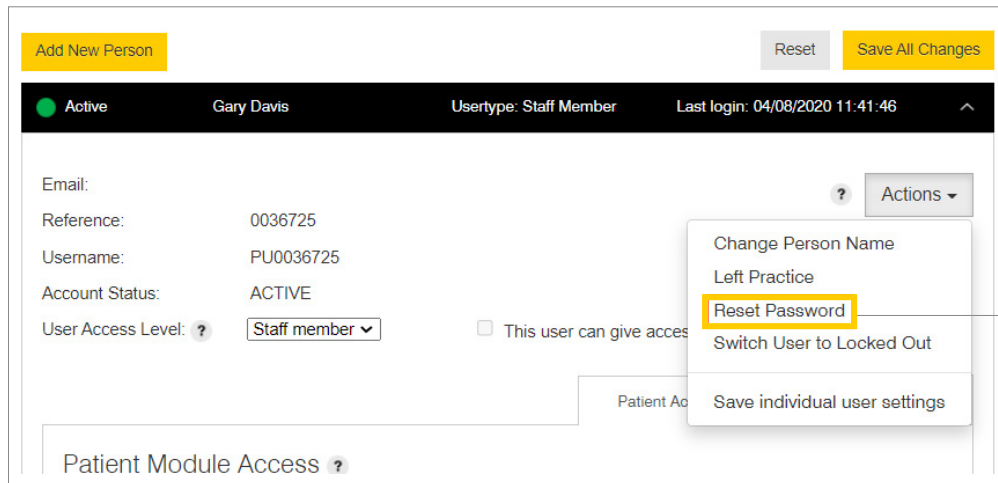
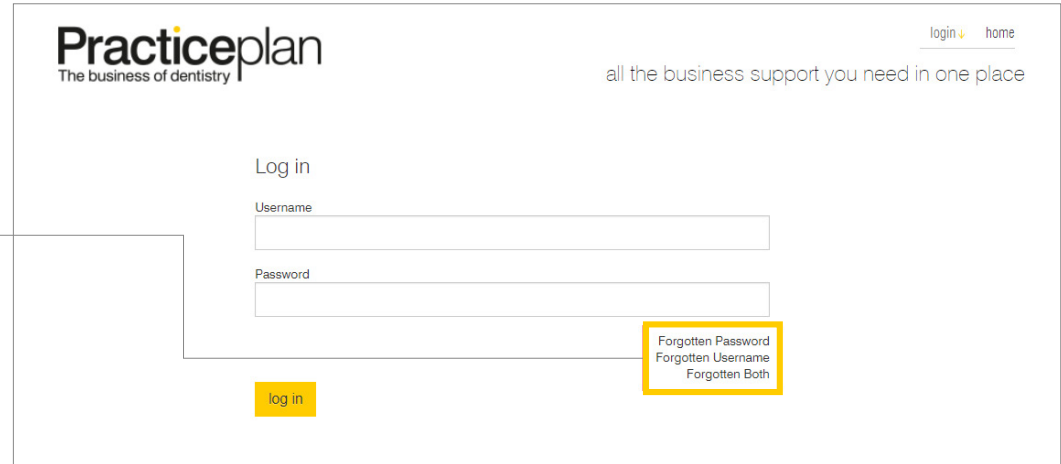
Below this is a section titled 'Patient Data Access' with the instruction: 'Please select the data access range for the above services. This user can see patient data for the following:'. It includes a checkbox labeled 'All dentist(s) *'.

Resetting passwords

Depending on the user's access level, there's a few ways to reset passwords...

If you're an Owner or Admin level user, you can use the 'Forgotten Password' option on the login screen. This will send a temporary password to you by email.

Please note, this option is not available for Staff Member level users.



For Admin or Staff Member level users, you can use the 'Reset Password' option in the user's record in the Access Control Panel. This will display a temporary password on-screen, so make sure you make a note of it.

Please note, this option is not available for Owner level users.

IF YOU ARE EXPERIENCING ANY PROBLEMS,

PLEASE CALL 01691 684146

WE ARE OPEN 9.00AM - 5.00PM MONDAY TO FRIDAY

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