

ACCESS ALL AREAS

A guide to setting your dental team's
access to your practice online services

Practiceplan
The business of dentistry |

Your dental team's access to your online services

The Access Control Panel is a simple way to manage access for any user and within this guide we will take you through the settings and what they mean.

When activating your dental practice you will be required to set access for each of your users. Your Access Control Panel will appear with a list of current users transferred over from your contract details.

Add New Person ⏪ This will enable you to add any extra staff if not already listed for you.

Active	Sample Name 01	Usertype: Staff Member	Last login: Never Registered	⌵
Active	Sample Name 02	Usertype: Owner	Last login: Never Registered	⌵
Active	Sample Name 03	Usertype: Owner	Last login: 17/04/2014 12:43:15	⌵
No Access	Sample Name 04	Usertype: Staff M		
Active	Sample Name 05	Usertype: Staff M		
Locked Out	Sample Name 06	Usertype: Staff M		
No Access	Sample Name 07	Usertype: Staff M		
Active	Sample Name 08	Usertype: Staff M		

⏪ You will need to set each user's access settings. For each staff member, simply click on the ⌵ or row.

⏪ This will then open up the settings for that particular user.



The screenshot shows the user settings page for 'Sample Name 01'. It includes fields for Email, Reference, Username, and Account Status. Below these are sections for 'Patient Module Access' and 'Patient Data Access'. The 'Patient Module Access' section has dropdown menus for 'Patient Recruitment Service', 'Patient Plan Management', 'Insurance', and 'Cancellation Feedback Service'. The 'Patient Data Access' section has a radio button for 'All dentist(s)' and checkboxes for 'Sample Name 01' and 'Sample Name 02'.

Three key access settings

Active Sample Name 01 Usertype: Staff Member Last login: 02/05/2014 11:00:09

Email: sample.email@example.co.uk Reference: 0000000 Username: sample.email@example.co.uk Account Status: ACTIVE

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

2 Patient Access 3 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	Reader	Show Info
Insurance	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) *

OR (please select preferences)

Sample Name 01 Sample Name 02

There are three key access settings that must be authorised for each user:

- 1 User Access Level
- 2 Patient Access
- 3 Statement Access

1 User Access Level

The user access level defines what access the user has to certain services and which management tasks they can be authorised to carry out, such as resetting passwords.

There are three different access levels:

➤ **Owner:** An 'Owner' has full access to all security settings, services and management tasks. This setting is automatically selected for recognised owner(s) within your dental practice. Please note that this setting cannot be altered by any type of user.

If an Owner needs to be removed from the system for any reason, please contact Business Support on 01691 684165.

➤ **Admin:** An 'Admin' user has permission, granted by an Owner only, to manage the Access Control Panel for your dental practice. They can perform tasks such as:

- Add new users
- Reset passwords
- Lockout a Staff Member*
- Update Staff Member access settings
- Set access rights to view Statements for other Staff Members when authorised by an Owner to do so.

*With the exception of Owners. Admins do not have any rights to alter an Owner account setting.

➤ **Staff Member:** By default, a user other than Owner is set at 'Staff Member' level. A Staff Member does not have access to the Access Control Panel and therefore cannot alter any user settings or perform any management tasks within the control panel area.

On this basis, a Staff Member can only be given access to view your practice Statements and other service data if authorised by an Owner or Admin user.

Below is a summary of what each user level can do:

Access	Staff Member	Admin	Owner
Access to data modules	✓*	✓*	✓
Manage data modules and data access		✓	✓
Add new users		✓	✓
Existing user actions and maintenance, e.g. reset password		✓	✓
Give access to Statements		✓**	✓
Delegate Statement access provisioning to another user			✓

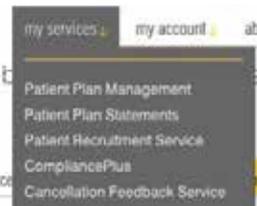
* Access must be granted.
** Please note that an Admin user can only be granted permission to give access to Dentist Statements by a user with Owner level status.

Other things you need to know:

➤ The drop-down menu called 'Actions' allows you to do things like change a user's name, reset their password or lock them out. The menu of actions available is dependent on the user.

➤ Owners can easily authorise Admins to provide access to Statements to other staff members by ticking this box.

2 Patient Access



Once your practice has been activated, each user will have a 'my services' area when they log into **www.practiceplan.co.uk**

As an Owner or Admin user, it is important to note that within the Access Control Panel, under the section **Patient Access**, you are setting each user's permissions to view and manage certain practice information which will be available in the 'my services' area.

Service	Access Level	Show Info
Patient Recruitment Service	No Access	Show Info
Patient Plan Management	Reader	Show Info
Insurance	No Access	Show Info
Cancellation Feedback Service	No Access	Show Info

The Patient Access area is split into **Patient Module Access** and **Patient Data Access**.

The **Patient Module Access** will display the services available with an explanation of what the service covers and allow the opportunity to set each one with a permission setting, for example, Reader, Editor or No Access.

An explanation for each permission setting can be found by clicking on the 'Show Info' button.

Show Info

Within this area you will also need to set the range of **Patient Data Access*** you're happy for them to see. A user can either have full dentist data or be restricted to specific dentist(s).

*For small print, see overleaf.

3 Statement Access

Statement Access has been set up so that you can control the access permissions separately as the information contained within this area is financially sensitive. If you grant permission to a user, it will be available in their 'my services' area once they are logged in. This tab is split into **Statement Module Access** and **Statement Data Access**.

Service	Access Level	Show Info
Patient Plan Statements	No Access	Show Info

You will have the opportunity to indicate within **Statement Module Access** if you want a user to have access rights and set the range of **Statement Data Access*** you're happy for them to view. A user can either have full dentist data or be restricted to specific dentist(s).

*Please note the ability to set data ranges within the Patient Access and Statement Access sections have been created in case your practice has the following types of scenario.

Scenario 1

You wish to give permission to an Associate to read all dentist data for Patient Access but only allow them access to their personal Statement Access data.

Scenario 2

You may have a Practice Manager who needs to view and edit all dentist data for Patient Access and must also have access to all Dentist Statement data.

Please note that providing full dentist data access to a user will provide an improved experience on the online system.

**ONCE YOU'RE UP AND RUNNING YOU WILL FIND MANAGING THESE
ASPECTS OF YOUR ONLINE PRACTICE SERVICES QUICK AND EASY.
IF YOU ARE EXPERIENCING PROBLEMS WITH ACCESS CONTROL**

PLEASE CALL 01691 684120

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