

iris Training

membership



Sign up a new member

Accessing the Iris Portal

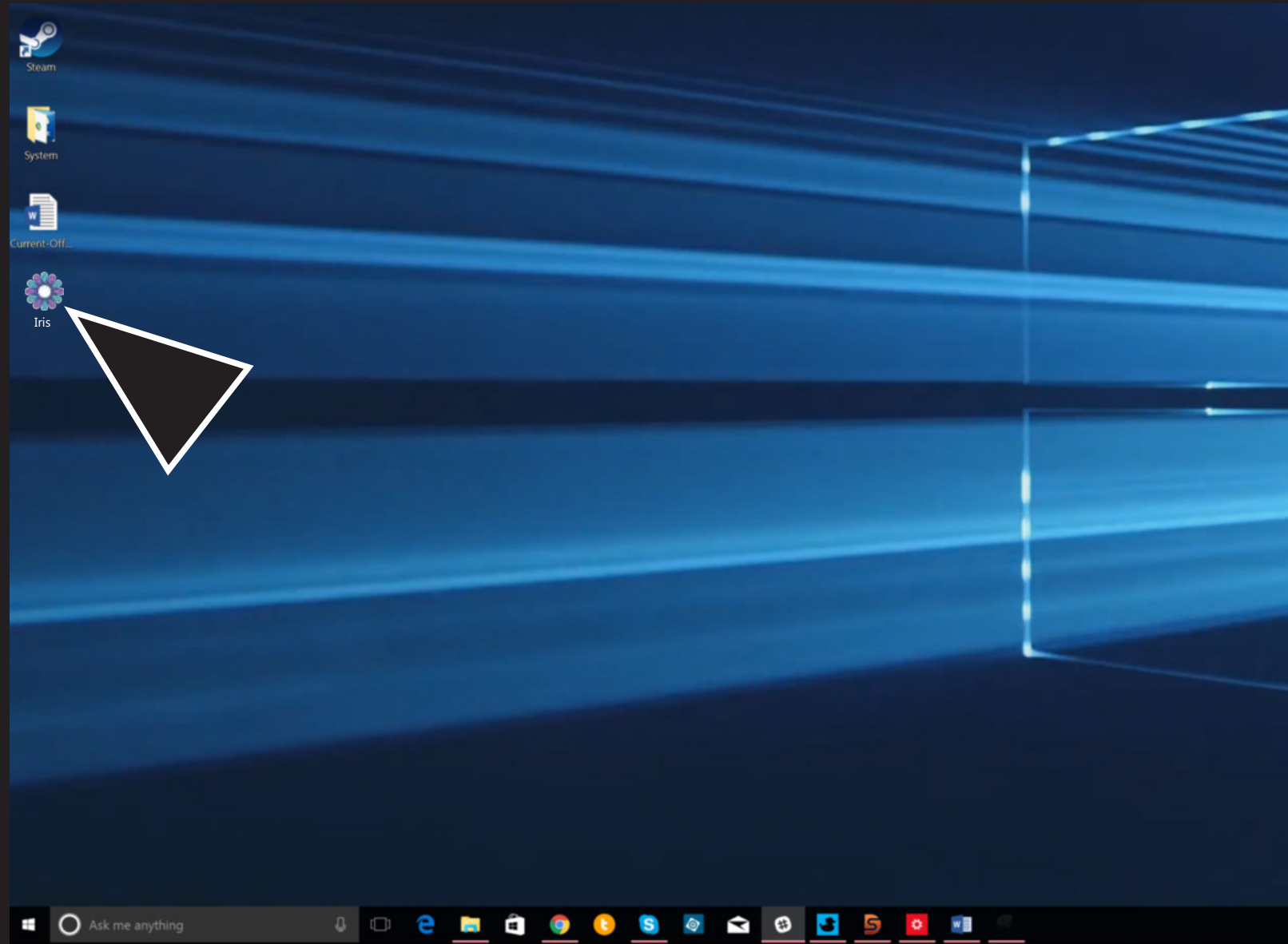
You require:

- Desktop computer or laptop
- Windows tablet
- iPad (to follow)
- Windows 7 or later
- Anti-virus & malware software
- Firewall turned on
- Internet Explorer
- Google Chrome
- Safari
- Desktop link icon, and/or
- Saved in favorites, and/or
- Saved as a bookmark, and/or
- Saved as a link in your browser

The portal will not appear in any searches in Google.

We will give you the link.

▶ **Click on the link . . .**



Logging in to the Portal

You require:

- Your user name
- Unique password

They are case sensitive

Enter your user name

Enter your password

Select your practice location

Click "SUBMIT"

These are given to you on the launch day. If you forget either of them, Iris or your admin user can reset them for you.

Practice Log In



A note on security

The Iris Portal uses the same type of online security that your bank uses.

You must never:

- Reveal your user name or password to anyone else, including other members of staff
- Reveal or pass on the link to your Iris Portal to anyone who does not work in your practice
- Forget to log-out when you have completed a task
- Leave a patient unattended with a computer or tablet while you are logged into the portal

You must:

- Report any suspected breaches in security immediately to the Iris team



What do you want to do?

There are five options:

- **New** - Sign up a new member
- **Search** - find an existing member
- **Quote** - get a quick idea of how much a potential new members monthly payments might be
- **Admin** - For admin users only
- **Logout**

For this training module, we are looking at the new member sign-up process so -

Click "New"



New member's details

Please ensure you use:

- Capital first letters

Enter the information in each field by first clicking in the empty field

You can also use the "tab" key to move to the next field

Certain fields require information in a specific format, such as:

- Date of Birth - DD/MM/YYYY
- Postcode - LLN(N) space NLL
- Phone No's - include code

New Member Sign Up

Name

Title



Surname

Forename

Address

House

Street

Town

County

Postcode

Personal

Date of Birth

Communications

Following the introduction of the General Data Protection Regulations (GDPR), you must now gain consent from each member to send them marketing information:

This however does not apply to communications that are considered as an essential process of providing a service to them.

You must therefore obtain at least:

Their full address and either a phone number or email address

Tick at least one option

You also need permission to send them future marketing information.

Tick either "Yes" or "No"

If "yes", tick by which method

You must read the options out to them and allow them to make the choice.

Date of Birth

DD/MM/YYYY

Communication Preferences

Email

Telephone

Preferences for receiving essential communication regarding your membership

☐

Email

☐

Post

We would like to send you occasional information about special membership offers. Are you happy to receive such information?

☐

Yes

☐

No

If "Yes" How would you like to receive this information?

☐

Email

☐

SMS

☐

Post

Security Question

Extra security

When a member phones the practice about their membership, if you have any suspicions that the call may be bogus, you can ask them to answer the security question.

Select a question from the drop down list

Enter the members answer

Click "SUBMIT"

☐ Email ☐ SMS ☐ Post

Security Question

Question



Answer

Submit



Membership options

It's assumed you will have already discussed the various membership options using your patient membership literature.

Tick - the chosen level

Contact lenses wearers

You can choose to add contact lenses and/or solutions or extras in any combination you choose. Your lens and solution products and pricing are built in.

Select Right Lens from the drop down

Select Left Lens from the drop down

Select Solutions from the drop down

Select Extras from the drop down

Click "Submit"

Non contact lens wearers

Simply leave all the fields as they are with either "No Lens" or "No Solution"

New Member Sign Up

Membership Level

Basic

☐

£8 per month

Standard

☐

£10 per month

Premium

☐

£14 per month

Contact Lenses

Right Lens

▼

Left Lens

▼

Solutions

▼

Extras

Postage

▼

Submit

Membership number

Each new member is to be handed a complete membership pack.

Inside each membership pack is a membership card with a unique membership number.

Grab a new membership pack

Enter the unique membership number

Click "Submit"

New Member Sign Up

Membership Number

From a new membership pack - enter the unique membership number

Number

Submit



Confirmation page

Before the banking section, you have the chance to to check all the data you've entered is correct and the correct membership options and lenses have been added.

If it all looks correct . . .

Click "SUBMIT"

If anything is incorrect . . .

Click the "Edit" next to it

Re-enter the correct information or amend the membership options

Click "SUBMIT" in that section

Click "SUBMIT" on this page

New Member Sign Up

Confirmation

Name	Membership No:		Edit
Address			
Communication Preferences			
Membership Level	Standard	£10.00	Edit
Right Contact Lens	Biofinity Monthly	£3.50	
Left Contact Lens	Biofinity Monthly	£3.50	
Solutions	Opti-Free	£4.00	
Extras	Postage	£1.50	
Total	Monthly Direct Debit	£22.00	

Submit

Bank details

To complete this section, you must:

Have the actual bank account holder present

Read out the monthly amount they are agreeing to pay

Ask them for verbal acknowledgment that they are happy to go ahead

Enter - Account name

Enter - Account number

Enter - Sort code

Confirm the monthly amount they are agreeing to pay and that payments are taken on the 6th of each month

Ask them to "tick" the declaration box

Click SUBMIT"

New Member Sign Up

Banking Portal

Live Direct Debit setup

Total monthly payment £22.00
First payment will be taken on date . . .
Followed by payments of £22.00

Account Name

Account No.

Sort Code

Declaration

Confirm you agree to the terms and conditions . . .

☐ Yes

Submit

Bank confirmation

This page confirms that the Direct Debit setup has been successful.

It also displays the full Direct Debit guarantee text.

You do not need to read this out in full to the new member as it is sent to them by the chosen method they selected in the communication preferences section earlier.

Click "FINISH"

New Member Sign Up

Banking Portal

Live Direct Debit confirmation

Congratulations! Your new direct debit has been successfully setup

A copy of the agreement and Direct Debit guarantee has been sent the member

Finish



Completion page

This displays all the details of your new member.

To finish the sign-up process you must:

Click "Complete Membership"

Finish New Sign Up

Confirmation

Name
Address
Communication Preferences

Membership No:

Membership Level	Standard	£10.00
Right Contact Lens	Biofinity Monthly	£3.50
Left Contact Lens	Biofinity Monthly	£3.50
Solutions	Opti-Free	£4.00
Extras	Postage	£1.50

Total	Monthly Direct Debit	£22.00
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Complete Membership Sign Up


Member record page

You will then be taken to the new members main record page.

No further action is required on this page.

You can select any of the other portal options at the top or -

Click "LOGOUT"

Member Record			
Name		Membership No.	
Address DOB Communication Preferences		Date joined	
			Edit
Membership Level		Standard	£10.00
			Edit
Right Contact Lens		Biofinity Monthly	£3.50
Left Contact Lens		Biofinity Monthly	£3.50
Solutions		Opti-Free	£4.00
Extras		Postage	£1.50
			Edit
Other grouped family members			
Name		£10.00	Edit
Banking		Monthly Direct Debit	£32.00
			Edit
<div><div></div><div>Add family member</div></div>			

Other training modules

Once you are familiar with signing up a new member, you may also like to look at:

- Searching for a member
- Using quick quote
- Amending a member's details
- Amending bank details
- Adding a group family member
- Removing a group family member
- Transferring a group member



Secure

Paperless mandates

Embedded contact lenses & solutions

Live Direct Debit setup

Automated email/letter to member

Access to your data

Configured to your requirements