



PLAN FORWARD

FEATURES GUIDE

ENROLLMENT LINK

Your practice has a unique link that can be featured and displayed on your website, social media pages, and in emails. This will allow patients to sign up for your membership plans online. The external enrollment link can be found under the members tab on your Plan Forward dashboard. Click the **Copy Enrollment Link** button and post away!



FAMILY DISCOUNTS

For practices who would like to offer a discount to multiple family members, you can absolutely do so. To activate this option, click on the **Admin** tab and select **Membership Discounts**. Choose the location if applicable and then enable the discount checkbox, enter the number of members to qualify, and amount of the discount percentage & update. (Discount only applies to the monthly or annual amounts)

APPLYING ENROLLMENT FEE

During enrollment process in the **Member Details** section there is a drop down option under enrollment fee where you will (if applicable) **Apply or Waive an Enrollment Fee**.

Be sure to apply the correct enrollment fee as per your practice protocol.



PLAN DESCRIPTIONS

Under the **Plans** tab at the top of your **Plan Forward** dashboard, you will find a plan description feature. This information is displayed on your external enrollment link page to inform patients of the benefits each membership plan contains. You will find the details of the plan, codes & fees, be able to make price adjustments and more.

NEEDS ATTENTION SECTION

A **Needs Attention** section is located on the home page and at the top of your member page. Here, members who have had a recent billing failure, card expiring, or card failure will show. Additionally, partial or new enrollment patients will appear in this section that have signed up via your external enrollment link.



TEXTING CHECKBOX

During the enrollment process, the **enable text messages** checkbox is located under the phone number when entering account details. Be sure to ask the account holder if they would like to receive text messages about their membership plans. Additionally, you can add this option to a current account by locating the account holder and choosing the edit details button at the top of the page and checking off the box to enable messages under the account holder's phone number.

FAILED TRANSACTION

In the event of a failed transaction, an email is sent to the account holder that will allow them to update and reprocess the failed transaction. If the patient would like to correct this through your office, you will click on the **Account Holder** of appropriate member, update the credit card information, and select **Reprocess** from the red notification window at the top of the page. A window will appear to confirm reprocess or waive the transaction & the submit button.



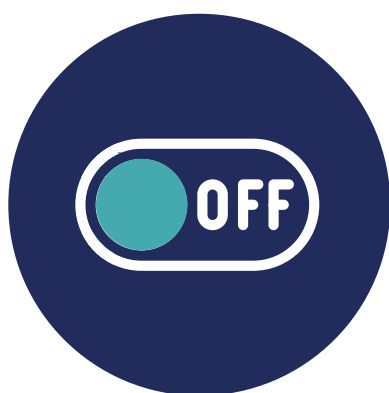
REFUND PAYMENT

In the event that a refund is necessary you will locate the **Account Holder** of the appropriate member to be refunded.

Under the **Transaction History** section, click on the dropdown arrow next to the date of the charge that needs to be refunded and a refund button will appear .

PRINT RECEIPT

A receipt of any transaction will be sent to the **Account Holder's** email address on file. Should a physical receipt be needed, you will locate the **Account Holder** of the appropriate member. Under the Transaction History section, click on the dropdown arrow next to the date of the charge that you want the receipt for and a **Print Receipt** button will appear and redirect you to a print page once you click on it.



INACTIVATE MEMBER

For any reason a member profile needs to be inactivated, select the **Account Holder** of the specific member, click on the **Edit Details** button at the top of the page, and select **Members** from the box on the left side of the page. Locate the appropriate member and the **Deactivate** option next to their name. A pop up will appear for you to choose the **Reason for Deactivation** (Early Termination or Non-Renewal) and a **Deactivation Date** will be required.

RESOURCES

A **Resources** tab can be located at the top of your toolbar on the Plan Forward platform. Here, you will find helpful videos and documents to ease your experience, and navigate through the system effortlessly. Always, feel free to contact your client success manager for any recommendations or further assistance needed.



REPORTING

Several reporting options are available for you to run, whether you're closing out your end-of-day process or wanting to view your total transactions. You can find a quick link to the EOD report with the button at the top right of your home page. You can also click on the **Analytics & Reporting** tab at the top of your dashboard and select the appropriate report and date you wish. Each report can be exported by CSV, Excel, or PDF.

MEMBER AGREEMENTS

During enrollment process, in the **Agreements** section, you will have the option to have your **Account Holder** sign the member agreement electronically by sending a text. Once the member signs and a representative from your practice signs, the member will receive a copy and it will automatically be uploaded into their account.

You can also choose to print and have them sign the agreement and then provide them with a copy. Be sure to uplodad the agreement to their account.

