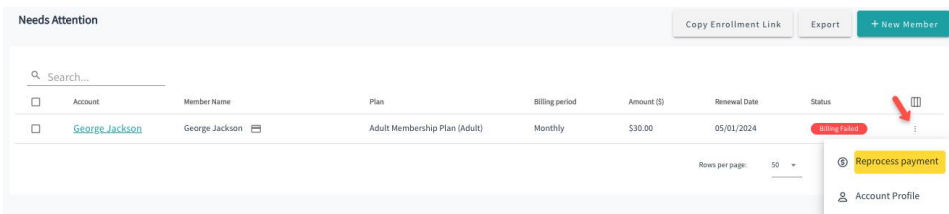


## Plan Forward Guide to Handling Failed Payments

### Failed Payment

- a. If a member's payment fails, our system will try up to 5 days in a row to process the payment
- b. The member is sent an email and/or text message letting them know about the failed billing including a link for the member to update their payment information
- c. If a member updates the payment information via the link with a valid payment method, the system will automatically process the payment
- d. After the 5 days, if there is not a successful payment, we recommend calling the member to update the payment information manually
  - i. For a single location practice, locate the member by choosing the accounts tab at the top of the page
  - ii. For multi-location practices, locate the member by first choosing the locations option at the top of the page and then choosing the correct location and then the accounts tab under the practice location name
  - iii. Locate the member with the failed billing in the needs attention section and click on the three dots on the right and choose "reprocess payment"



- iv. You will automatically be taken to the account holder page and a pop-up window will appear where you can update the payment information and/or method as needed
- v. You can choose to reprocess all payments due or waive any payments if applicable with the dropdown box
- vi. Choose the Submit button to process or waive the payment

