Plan Forward Essential Member Enrollment Reference Sheet

1) Please **DO NOT** process membership payments outside of the Plan Forward platform.
2) Make sure the doctor/hygienist has seen the patient(s) FIRST before assigning them to a plan.
3) Log into https://app.planforward.us
4) If you are a single location practice, choose the **Accounts Tab** at the top of your platform and go to **Step 7**
5) If you are a M**ulti-location Facility**, click on the **Locations Tab** at the top of your platform next to the **Home Tab** & choose the correct location to add the member
6) Click the **Accounts** option under the practice name
7) Click on the **+New Member** button on the right side of the page
8) Choose:
    a. **Account** if new account/family on Plan Forward.
    b. **Individual Member** if adding to an existing account on Plan Forward.
9) For **Account:** Enter Responsible Party/Member(s) Information
    a. Account Details:
        i. Chart number if applicable or check the box for no chart number
        ii. Account Holder/Responsible Party name
        iii. Phone number
            1. Choose Enable Text Messages if patient agrees to receive notifications by text
        iv. Email – remind account holder/member this is how they receive communications about their plans
        v. Mailing Address
        vi. Choose the "**Add as a member**" box if you are enrolling the account holder as the member in a dental plan. If not, do not check the box and you will add the member on the member details page
    b. Member Details:
        i. If account holder & member are the same, choose Click to Finish Setup; if they are different, you will enter the member information & plan details first by choosing the +Add Member option
        ii. Under the Plan Details Enter:
            1. Member's Date of Birth from the calendar or in the format MM/DD/YYYY
            2. Dental Plan (Adult, Child, Perio, etc.)
            3. Billing Frequency (monthly or yearly)
            4. Enrollment Fee (Waived, Existing Patient, New Patient)
            5. Choose Finish & Add Button
        iii. If you have an additional member to add, Choose the "+ Add Member" button; if not click continue
    c. Billing Details:
        i. Select the correct payment method (Credit Card, ACH, Cash or Check)
            1. For Credit Card enter the CC number and the Expiration Date
            2. For the ACH ask the member for a voided check or deposit slip to confirm banking information and enter the corresponding Routing & Account number and the Account Type (Checking or Savings)
        ii. If the Billing address is different, click the corresponding box and enter the billing address; otherwise, click continue

d. Agreements
    i. Choose the preferred method for the member to sign the agreement
        1. Text
            a. The member will receive a text to review and sign the agreement electronically
            b. The practice will receive an email to sign the agreement
            c. Once signed by both parties, it will be automatically uploaded to the member profile, and they can download a copy via the link for their records.
        2. Print
            a. Print the form and have the member sign and date
            b. Have a representative from the practice sign and date
            c. Make a copy for the member
            d. You will upload a copy to the account later (see step 10)
            e. Click Continue

e. Summary
    i. Review Summary Page to confirm all information is correct before processing
    ii. Click Finish to process the payment and enroll the member

10) **Upload Member Agreement**

a. Locate the account under all members or use the search option to find the account and click on the name under the account heading or click on the 3 dots at the end and choose Account Profile
b. Click on the correct member's name you are uploading the agreement for
c. Click on the **"Upload Signed Member Agreement"** option on the left side of the page
d. Upload the correct document to the correct member
e. Click on OK in the upload successful notice