

BILLING AND RENEWAL DATES

 MAY

MONTHLY BILLING PERIOD

- If a patient chooses a monthly payment option, they will pay a **prorated** amount for the first month plus any enrollment fee (if applicable).
- The first full month payment will be billed on the 1st of the following month and will continue for all subsequent months.
- The renewal date will be set for 1 year from their first full monthly payment.

Example

- A new patient joins April 12, 2020.
- The patient will pay the prorated amount for April plus the joining fee (if applicable).
- Their next monthly payment will process on May 1, 2020 and their renewal date will be set for May 1, 2021.

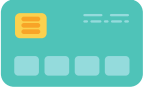
 2020

ANNUAL BILLING PERIOD

- If a patient chooses an annual payment option, the patient will pay the full membership amount plus any enrollment fee (if applicable) on the day they join.
- The renewal date will be set for exactly 1 year from the day the patient joins.

Example

- A new patient joins April 12, 2020.
- The patient will pay the the full annual membership amount plus any enrollment fee (if applicable) on the day they join.
- Their renewal date will be set for April 12, 2021 and they will be billed each year on that date.



CARD EXPIRING

In the event of a patient's credit card expiring, notifications will be sent to the responsible party's email address. They will be able to make changes to the credit card on file and it will be reflected in the **Plan Forward** system. All active links will be valid for seven days.

Example

- Patient's credit card expires in May.
 - **Notification 1:** April 1st- email 1 is sent with an active link to update credit card.
 - **Notification 2:** April 15th - email 2 is sent with active link to update credit card.
 - **Notification 3:** May 1st - final email is sent with active link to update credit card.

On the same day of the final email the patient's account will move to your **Needs Attention** section of your dashboard.



FAILED PAYMENT

In the event of a patient's credit card payment fails, a notifications will be sent to the responsible party's email address. They will be able to make changes to the credit card on file and it will be reflected in the **Plan Forward** system. All active links will be valid for seven days.

Example

- Patients credit card declines on the 1st of May.
 - **Notification 1:** May 1st - email is sent with active link to update credit card.

On the same day that the patient's credit card payment fails, the patient's account will move to your **Needs Attention** section of your dashboard.



MEMBERSHIP RENEWAL

As a patient approaches their renewal date, notifications will be sent to the responsible party's email address informing them of their renewal. These notification will be sent at **2 months** and **1 month** prior to the member's renewal date.

The email also contains the following information:

- If you currently have any unused benefits outstanding be sure to schedule any appointment prior to their renewal date.
- Please contact us prior to billing date if you have any questions or wish to make any changes.