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 at the top of 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 larger families, you can do so! To activate this, click on the **Admin Settings** tab and select **Member Discounts**. Then enable the discount checkbox, enter the number of members to qualify, and add the discount percentage desired.

(Discount only applies to the monthly or annual amounts)

ENROLLMENT FEE

During enrollment in the **Edit Member** section there is a checkbox that states **Apply New Patient Enrollment Fee**. This checkbox is important because if selected, it will activate any new patient enrollment fee (if applicable) to your practice. Be sure to check this box if it applies! If left unchecked, any existing patient enrollment fee will be applied (if applicable).

PLAN DESCRIPTIONS

Under the **My Plans** tab, 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 can edit this information by **hovering over the three dots** located at the end of the row. Select **Edit Plan** to change any pricing or details.

NEEDS ATTENTION SECTION

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

TEXTING CHECKBOX

This feature is not yet available. However, a texting checkbox is located on the platform. Currently, you are able to select this checkbox and get permission from your patients to text. Once this feature is rolled out you will be able to text these members. Stay tuned for updates!

FAILED TRANSACTION

In the event of a failed transaction, an email is sent to the patient that will allow them to update and reprocess the transaction. If the patient would like to correct this through your office, you will click on **View Profile** of the appropriate patient, update the credit card information, and select **+ Add Transaction.** A window will appear to select the method of payment, then process the transaction to finish.

REFUND PAYMENT

In the event that a refund is necessary. Click **View Profile** of the appropriate patient and locate the **Billing History** section. Click on the "**+**" sign of the charge that needs to be refunded and a refund button will appear under the **Payment Summary.**

PRINT RECEIPT

A receipt of any transaction will be sent to the **Responsible Party's** email address on file. Should a physical receipt be needed, click **View Profile** of the appropriate patient, locate the **Billing History** section, and select the "**+**" sign of the transaction you would like to print. A **Print Receipt** button will appear and redirect you to a print page once you click on it.
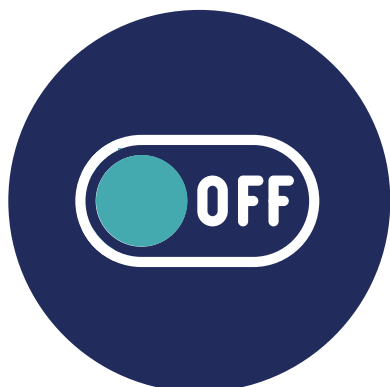
INACTIVE MEMBER

For any reason a member profile needs to be inactivated, select **View Profile** of the specific patient, **hover over the three dots** on the right hand side of the member, and select **Inactivate Member**. A **Termination Date** will be required, which will be the date of inactivation and the final billing date of the patient. Click **Yes, Cancel Plan** to finish.

RESOURCES

A **Resources** tab can be located at the top of your toolbar in 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. Click on the **Reports** tab at the top of your dashboard and select the appropriate report and date option you wish. Each report can be exported to CSV, Excel, or PDF.