Get excited!

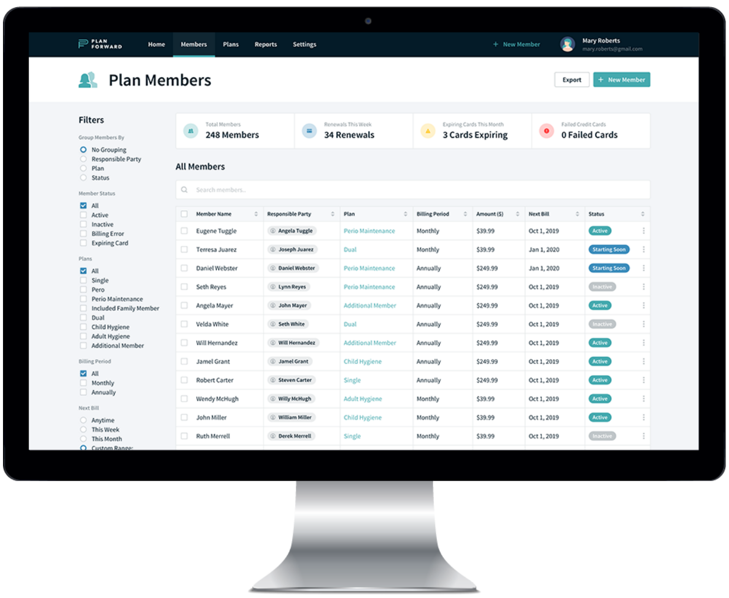
You are at the finish line of your Plan Forward onboarding experience and all that's left to do is familiarize yourself with your plan and the platform! This should be a fairly quick process just follow these four steps and you will be an expert in no time. As always, feel free to contact your client success manager or refer to your Resources Tab in the Plan Forward software, should you have any questions.

1 Membership Plan Overview

Here is a quick overview of the benefits your in-house plan includes, when and how to talk to patients, and best practices on managing your plan. Click here to watch!

2 Member Agreement Overview

This next video will explain your membership agreements in just 4 minutes. It's fairly simple and straight forward, click here to get started.



3 Software Overview & Layout

Now that you are familiar with the best practices and membership agreement, lets dive in to the software overview and layout. Don't forget to use the username and password information sent to your email. Click here to watch.

4 Member Software Enrollment

You are now ready to enroll new members! Lets talk about what to do when patients signs up for your membership plan and how navigating through their profiles. Click here to finish!

PLAN FORWARD

New Client Training Guide