

## 1-2-3 Steps for the Funding Process

# The Funding Process

### Step 1

- Find your state-specific forms at [forbesaac.com/funding-forms](http://forbesaac.com/funding-forms) and scroll down to find your client's state and click it.

### Step 2

- Download the forms, fill them out and complete your AAC Evaluation
  - You will have the option to download our **Evaluation Writing Guide** – if you would like to use our template, you can access it in our members area - [forbesaac.com/member-resources](http://forbesaac.com/member-resources).
  - You do not have to use our template if you have one you are already using successfully

### Step 3

- Submit your packet by e-mail to [funding@forbesaac.com](mailto:funding@forbesaac.com) or fax **419.589.5146** or through our funding portal.

*After you submit your packet, the funding team will reach out to you via e-mail to confirm all documents have been received, or if any revisions need to be made within a couple of business days. You will also receive a request to review the quote for your client's order to ensure order accuracy. After you approve the quote and submit all the necessary documents, we are ready to submit the packet to insurance.*

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#### To sign up for an account in our funding portal – follow these instructions:

- [forbesaac.com/funding-portal](http://forbesaac.com/funding-portal) Click the green "Funding Portal" button
- Underneath the log-in, click on "Account Activation"
- Enter your e-mail address, and you will be sent a link to activate your account
  - make sure to sign up with the same e-mail that you put on your funding forms, otherwise you will not be able to view files within the portal. If you would like to use a different e-mail to access the portal, please message us your preference at [funding@forbesaac.com](mailto:funding@forbesaac.com)
- After you have created your account, go into the funding portal and click "Submit New Funding Packet"
- Upload your documents – in 2-3 business days, you will be able to view your patient's file and will have the opportunity to upload any remaining documents needed.
- If you have any difficulty uploading documents into the portal, please e-mail or fax us your packet.

For questions go to [forbesaac.com/funding](http://forbesaac.com/funding)  
or [funding@forbesaac.com](mailto:funding@forbesaac.com)

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