

Setting up Subscription Memberships

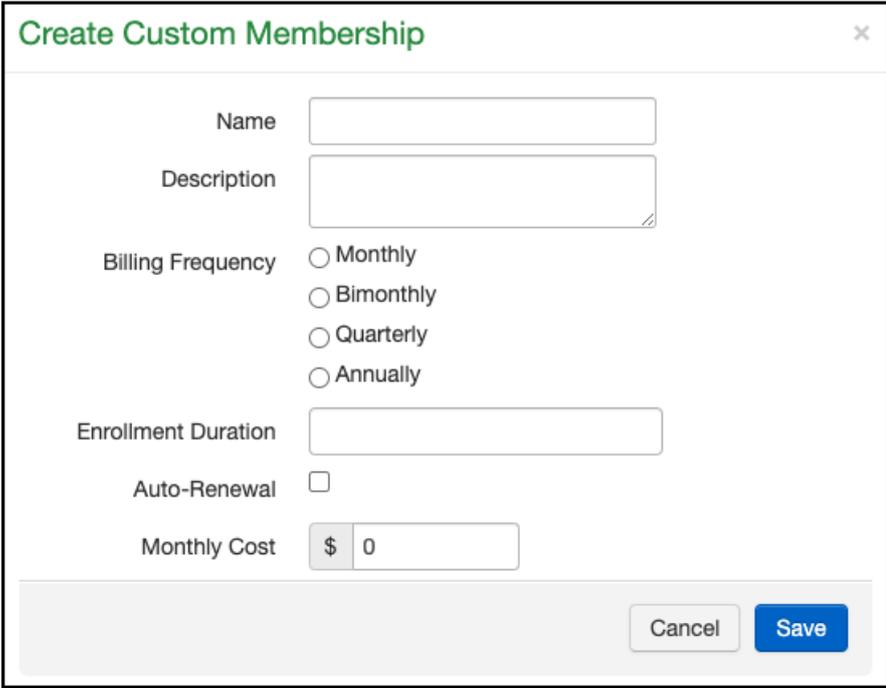
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Setting up a subscription membership

Before placing a patient on a subscription or membership plan, you must set it up for your practice. Once set up, it can be easily used for your patients. No updates will be needed until/unless you want to make changes.

To set up a subscription membership:

1. Navigate to **Account > Custom Fields > Custom Memberships**
2. Press **+ Add New Membership** in the upper right corner of the page.
3. This pop-up menu will appear to allow you to enter the plan specifics.
 - a. **Name** - This is what will appear when you add the membership to a patient
 - b. **Description** - Provides additional details about the custom membership
 - c. **Billing Frequency** - Specifies how often the patient pays for this custom membership
 - d. **Enrollment Duration** - Specifies how long the membership is valid
 - e. **Auto-Renewal** - This will auto-bill your patients each duration stated in the enrollment duration question. You must be using DrChrono Payments to utilize this feature.
 - f. **Monthly Cost** - Specifies what the patient will be charged if the plan renews monthly.



The screenshot shows a pop-up window titled "Create Custom Membership" with a close button (X) in the top right corner. The form contains the following fields and options:

- Name:** A text input field.
- Description:** A text input field with a small icon in the bottom right corner.
- Billing Frequency:** A group of four radio button options: Monthly, Bimonthly, Quarterly, and Annually.
- Enrollment Duration:** A text input field.
- Auto-Renewal:** A checkbox.
- Monthly Cost:** A currency input field showing "\$ 0".

At the bottom right of the form, there are two buttons: "Cancel" and "Save".

4. Once the fields are filled in, press **Save**.



Generated membership charges and appointments cannot be edited or deleted. If a plan is canceled, any future membership charge appointments are automatically removed.
