Setting up Subscription Memberships

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The location of the feature will be changing. It will be moved to Account > Custom Fields. This article will be updated when the change is complete.

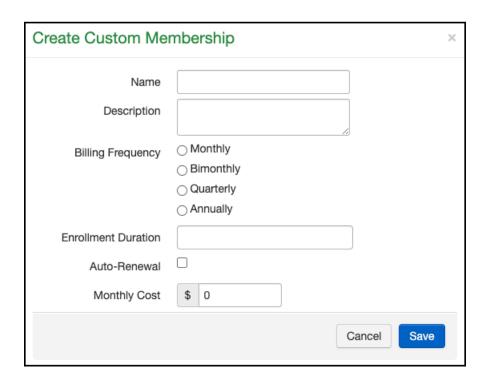
This feature is currently in beta.

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 Schedule > 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.



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