

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.

Create Custom Membership ×

Name

Description

Billing Frequency Monthly
 Bimonthly
 Quarterly
 Annually

Enrollment Duration

Auto-Renewal

Monthly Cost \$

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