

Adding a subscription membership to a patient's account

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Once the subscription/membership plan is established, it can be added to a patient's chart.

1. Navigate to a patient's chart via **Patient > Patient List**.
2. Select the **Demographic** tab from the list on the left of the screen.
3. A heading for Patient Payment Plans and Patient Memberships is directly under the balance section.
4. To add a Subscription/Membership, press **+ New Payment Plan**.

Patient Payment Plan						+ New Payment Plan
Due Date	Payment Amount	Estimated Remaining Balance	Autopay Enabled	Status	Action	
No Payment Plan Has Been Set						
Patient Memberships						
Creation Date	Payment Plan	Payment Plan Total Amount	Monthly Payment	Number of Payments	Status	Action
Mar 17, 2025 3:42:00 PM	Monthly Facial- 6 months	\$3,000.00	\$500.00	6	PENDING	Cancel

5. A window will open that will allow you to add existing memberships to the patient's account. Press the circle next to Selected Membership.

Create Payment Plan

Payment Option

☐ Patient Total Balance

☐ Selected Appointments

☒ Selected Membership

Select Membership

Total Duration

0

Billing Frequency

☐ Monthly

☐ Bimonthly

☐ Quarterly

☐ Annually

Monthly Payment

\$ 0

First Payment Date

mm/dd/yyyy

Enable Auto Payment

☐

Auto-Renewal

☐

Close

Create Payment Plan

6. Next, press the down arrow next to **Select Membership**. This will show you all of the membership/subscription plans set up for your office.

Create Payment Plan

Payment Option

☐ Patient Total Balance
☐ Selected Appointments
☒ Selected Membership

Select Membership

✓

10 chiro treatment plan- Spring

\$250 weekly facial

10 stretching sessions

Total Duration

Billing Frequency

☐ Bimonthly
☐ Quarterly
☐ Annually

Monthly Payment

\$ 0

First Payment Date

mm/dd/yyyy

Enable Auto Payment

☐

Auto-Renewal

☐

Close

Create Payment Plan

- Select the plan that you want to add to this patient's account. The fields set when the membership was created will populate.

Create Payment Plan

Payment Option

☐ Patient Total Balance
☐ Selected Appointments
☒ Selected Membership

Select Membership

10 stretching sessions

Total Duration

10

Billing Frequency

☒ Monthly
☐ Bimonthly
☐ Quarterly
☐ Annually

Monthly Payment

\$ 150

First Payment Date

mm/dd/yyyy

Enable Auto Payment

☐

Auto-Renewal

☒

Close

Create Payment Plan

- Enter the **First Payment Date** in the appropriate field.
- Press **Create Payment Plan** once done.
- The patient's account will reflect the subscription/membership plan added.

Patient Payment Plan						+ New Payment Plan
Due Date	Payment Amount	Estimated Remaining Balance	Autopay Enabled	Status	Action	
No Payment Plan Has Been Set						
Patient Memberships						
Creation Date	Payment Plan	Payment Plan Total Amount	Monthly Payment	Number of Payments	Status	Action
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- When a subscription/membership ends, the renewal will be effective the 1st of the following month.