

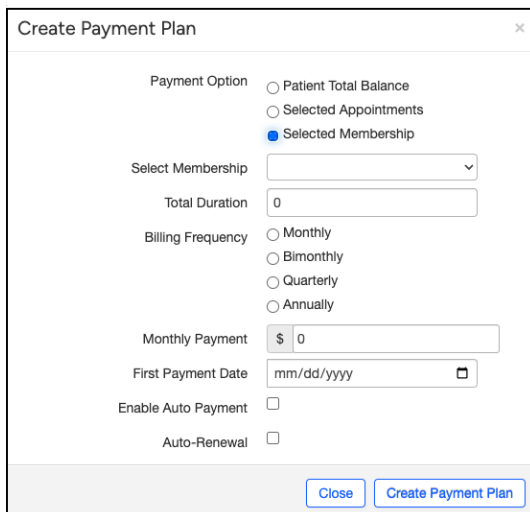
Adding a subscription membership to a patient's account

Last modified on 03/27/2025 7:53 am EDT

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

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**.

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

Billing Frequency

- Monthly
- Bimonthly
- Quarterly
- Annually

Monthly Payment

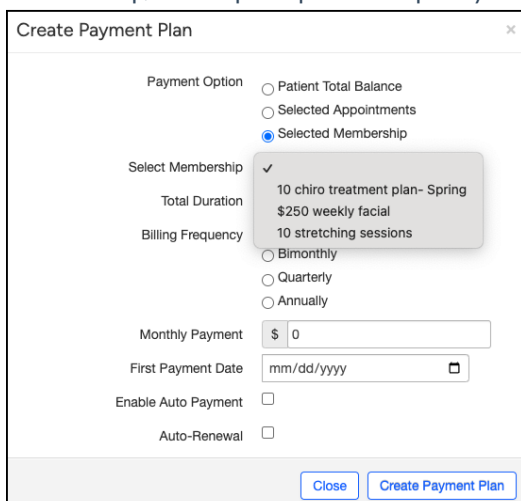
First Payment Date

Enable Auto Payment

Auto-Renewal

[Close](#) [Create Payment Plan](#)

6. Next, press on 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

Total Duration

Billing Frequency

- Bimonthly
- Quarterly
- Annually

Monthly Payment

First Payment Date

Enable Auto Payment

Auto-Renewal

[Close](#) [Create Payment Plan](#)

7. 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](#)

8. Enter the **First Payment Date** in the appropriate field.

9. Press **Create Payment Plan** once done.

10. The patient's account will reflect the subscription/membership plan added.

Due Date	Payment Amount	Estimated Remaining Balance	Autopay Enabled	Status	Action
No Payment Plan Has Been Set					

Creation Date	Payment Plan	Payment Plan Total Amount	Monthly Payment	Number of Payments	Status	Include on Statement	Action
Feb 12, 2025 8:59:46 AM	10 stretching sessions	1500.00	150	10	PENDING	True	Exclude from statement

11. The down arrow to the left of the Creation Date will list all upcoming payment dates and amounts. It will also allow you to exclude the subscription/membership from their patient statement so charges for the subscription/membership plan are kept separate from any other charges they may have with your office.

Creation Date	Payment Plan	Payment Plan Total Amount	Monthly Payment	Number of Payments	Status	Include on Statement	Action
Feb 12, 2025 8:59:46 AM	10 stretching sessions	1500.00	150	10	PENDING	True	Exclude from statement
Payment # : 1 Scheduled Date: 02/12/2025 Payment Amount: \$150.00 Remaining Balance: 1500.00 Status: PENDING							
Payment # : 2 Scheduled Date: 03/12/2025 Payment Amount: \$150.00 Remaining Balance: 1350.00 Status: PENDING							
Payment # : 3 Scheduled Date: 04/12/2025 Payment Amount: \$150.00 Remaining Balance: 1200.00 Status: PENDING							
Payment # : 4 Scheduled Date: 05/12/2025 Payment Amount: \$150.00 Remaining Balance: 1050.00 Status: PENDING							
Payment # : 5 Scheduled Date: 06/12/2025 Payment Amount: \$150.00 Remaining Balance: 900.00 Status: PENDING							
Payment # : 6 Scheduled Date: 07/12/2025 Payment Amount: \$150.00 Remaining Balance: 750.00 Status: PENDING							
Payment # : 7 Scheduled Date: 08/12/2025 Payment Amount: \$150.00 Remaining Balance: 600.00 Status: PENDING							
Payment # : 8 Scheduled Date: 09/12/2025 Payment Amount: \$150.00 Remaining Balance: 450.00 Status: PENDING							
Payment # : 9 Scheduled Date: 10/12/2025 Payment Amount: \$150.00 Remaining Balance: 300.00 Status: PENDING							
Payment # : 10 Scheduled Date: 11/12/2025 Payment Amount: \$150.00 Remaining Balance: 150.00 Status: PENDING							

12. When a subscription/membership ends, the renewal will be effective the 1st of the following month.