Adding a subscription membership to a patient's account

Last modified on 03/10/2025 11:33 am EDT
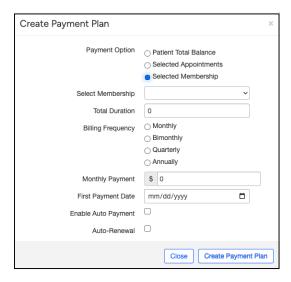
> ℹ️ This feature is currently in beta.

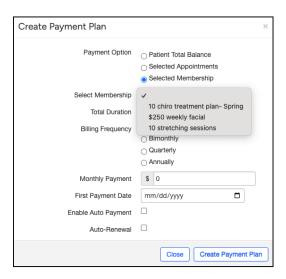Once the subscription/membership plan is established, it can now be added to a patient.

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.

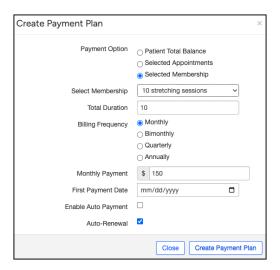4. To add a Subscription/Membership, **press + New Payment Plan**.

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.

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.

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

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.

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.

Patient Memberships

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.