

# 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						<a href="#">+ New Payment Plan</a>
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	<a href="#">Cancel</a>

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

Monthly Facial- 6 months

Billing Cycles

6

Billing Frequency

Monthly

Bimonthly

Quarterly

Annually

Total Duration

6 months

Monthly Payment

\$ 500

First Payment Date

mm/dd/yyyy

Enable Auto Payment

[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  
 **Membership**

Select Membership  Monthly Facial- 6 months

Billing Cycles

Billing Frequency  Monthly  
 Bimonthly  
 Quarterly  
 Annually

Total Duration **6 months**

Monthly Payment \$

First Payment Date

Enable Auto Payment

7. Select the plan that you want to add to this patient's account. The fields set when the membership was created will populate. The Total Duration will auto-populate based on the information entered.

### Create Payment Plan ✕

Payment Option  Patient Total Balance  
 Selected Appointments  
 **Selected Membership**

Select Membership  ▼

Billing Cycles

Billing Frequency  Monthly  
 Bimonthly  
 Quarterly  
 Annually

Total Duration **6 months**

Monthly Payment \$

First Payment Date

Enable Auto Payment

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.

Patient Payment Plan						<a href="#">+ New Payment Plan</a>
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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11. When a subscription/membership ends, the renewal will be effective the 1st of the following month.

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