

Adding a subscription membership to a patient's account

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i 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.

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**.

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	Include on Statement	Action		
No membership payment plan has been set									

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 10 chiro treatment plan- Spring
\$250 weekly facial
10 stretching sessions

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

Total Duration

Billing Frequency
 Monthly
 Bimonthly
 Quarterly
 Annually

Monthly Payment

First Payment Date 📅

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.

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	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 of the 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			