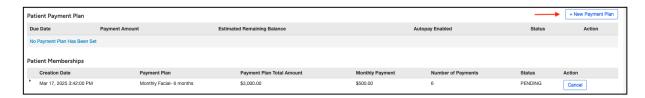
Adding a subscription membership to a patient's account

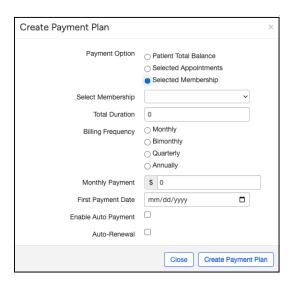
Last modified on 05/01/2025 12:33 pm EDT

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

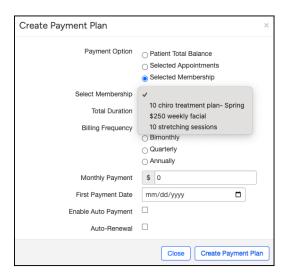
- 1. Navigate to a patient's chart via Patient > Patient List.
- 2. Select the **Demographic** tab from the list on the left of the screen.
- 3. A heading for Patient Payment Plans and Patient Memberships is directly under the balance section.
- 4. To add a Subscription/Membership, press + New Payment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



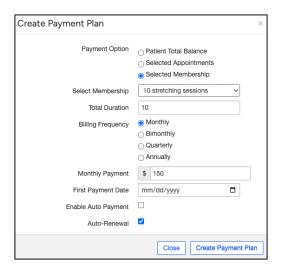
5. A window will open that will allow you to add existing memberships to the patient's account. Press the circle next to Selected Membership.



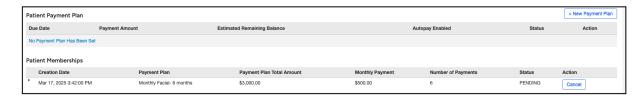
6. Next, press the down arrow next to **Select Membership**. This will show you all of the membership/subscription plans set up for your office.



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