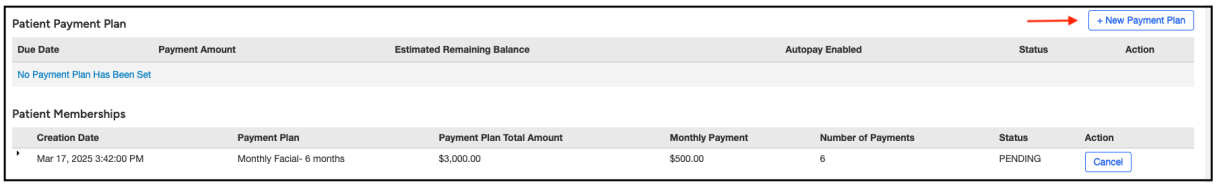
Adding a subscription membership to a patient's account

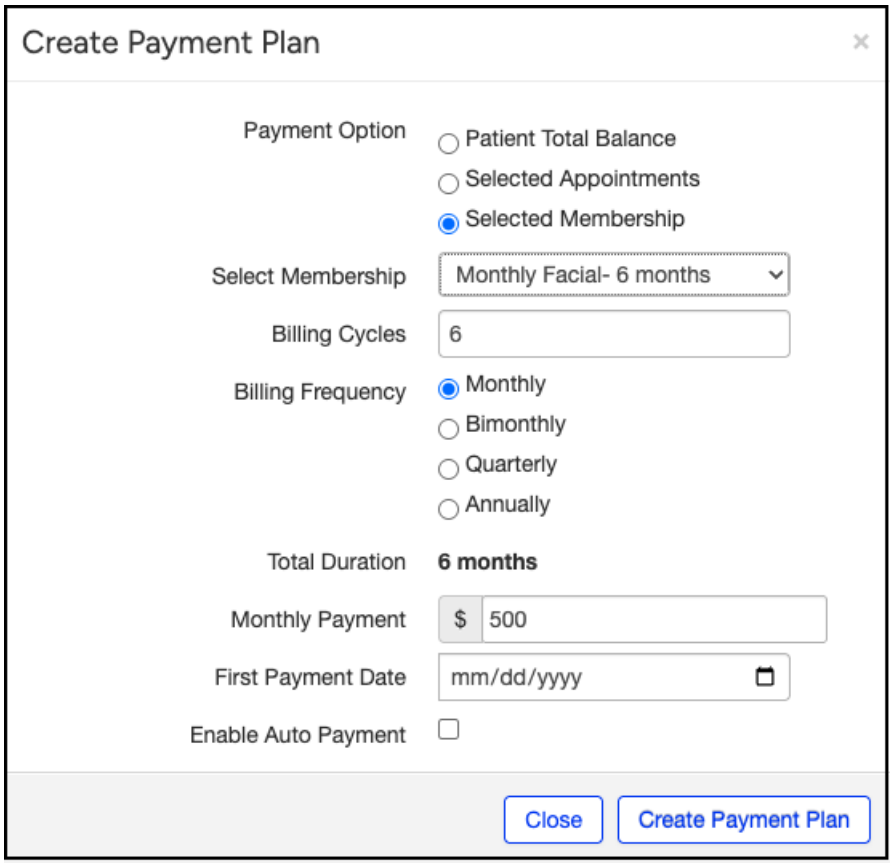
Last modified on 09/28/2026 2:44 pm EDT

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

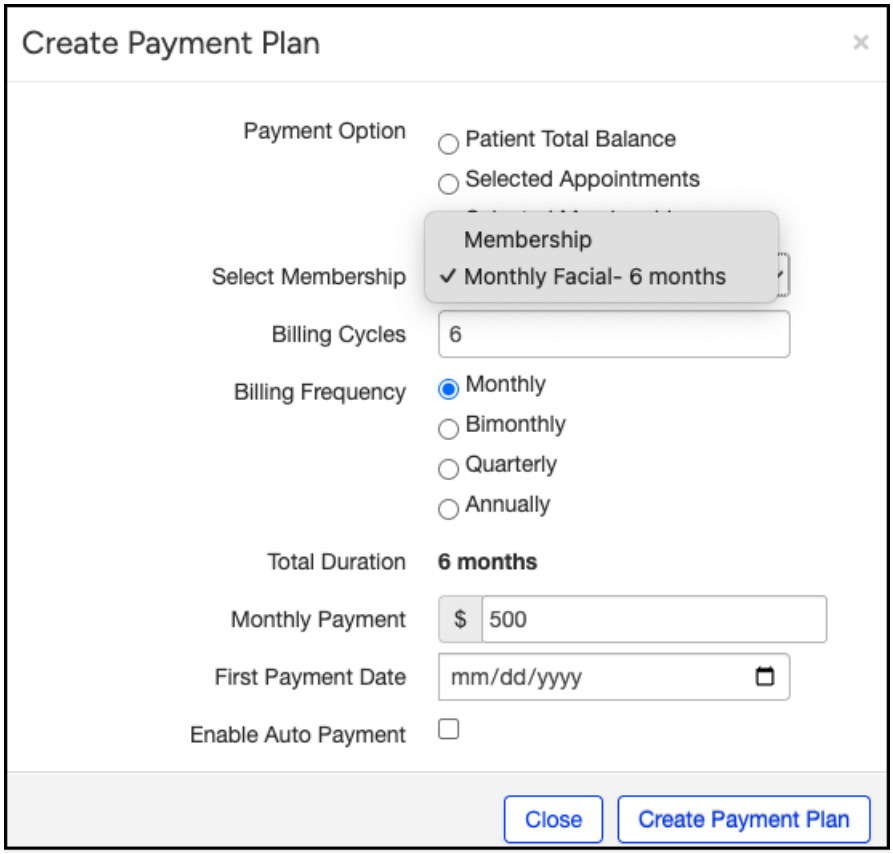
1. Navigate to a patient's chart via **Patient > Patient List.**
2. Select the **Demographic** tab from the list on the left of the screen.
3. A heading for Patient Payment Plans and Patient Memberships is directly under the balance section.
4. To add a Subscription/Membership, **press + New Payment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



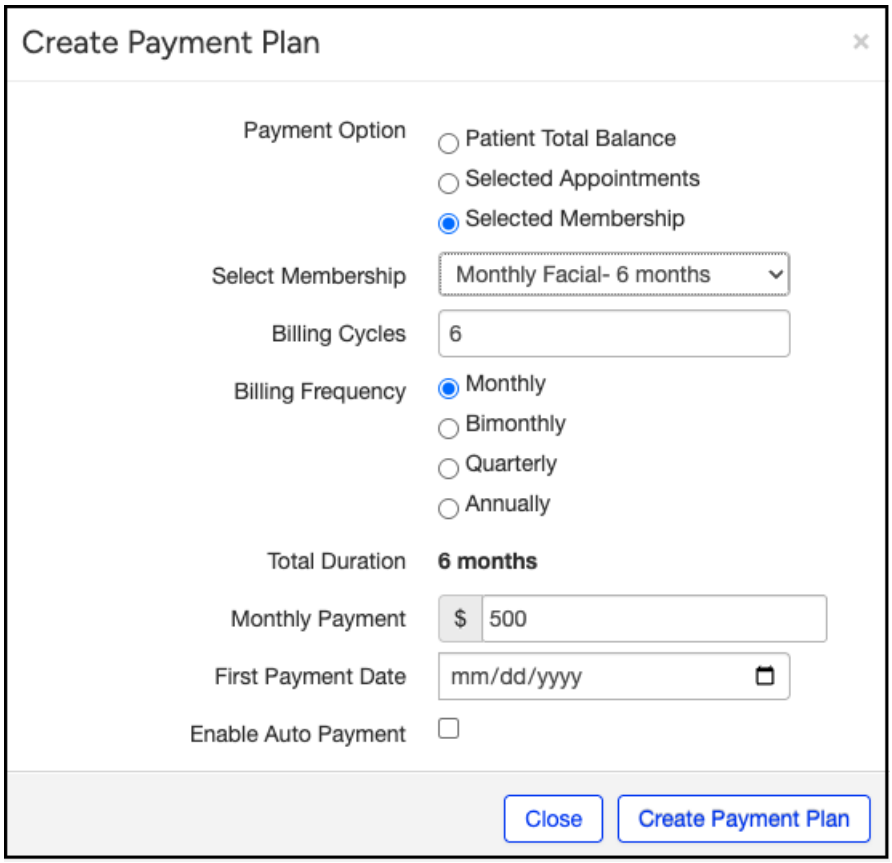
5. A window will open that will allow you to add existing memberships to the patient's account. Press the circle next to Selected Membership.



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.



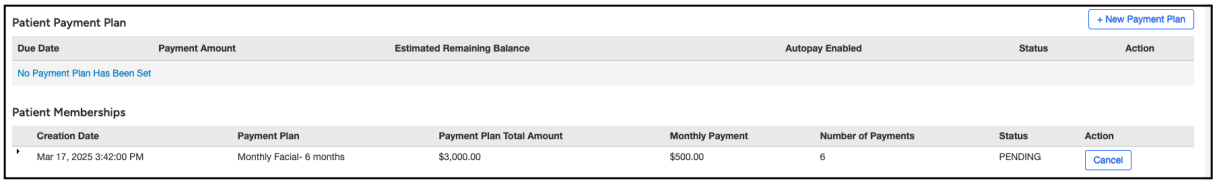
7. Select the plan that you want to add to this patient's account. The fields set when the membership was created will populate. The Total Duration will auto-populate based on the information entered.



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 on the 1st of the following month.