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					+ New Payment Plan		
Due Date	Payment Amount	Estimated Remaining Balance		Autopay Enabled	Status	Action	
No Payment Plan Has Been Se	ıt						
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	Cancel	

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 		
Select Membership	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		

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	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

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.

Pat	+ New Payment Plan						
Du	e 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	Cancel

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