

Memberships and packages

Plans patients pay for: a membership that bills on repeat, or a package paid once that counts down. Build it once, give it to a patient, and their benefits track themselves.

Feature manual · For Owners, Managers, Billing staff, Front desk · aminova.health/university/memberships-and-packages

1. WHAT THEY ARE

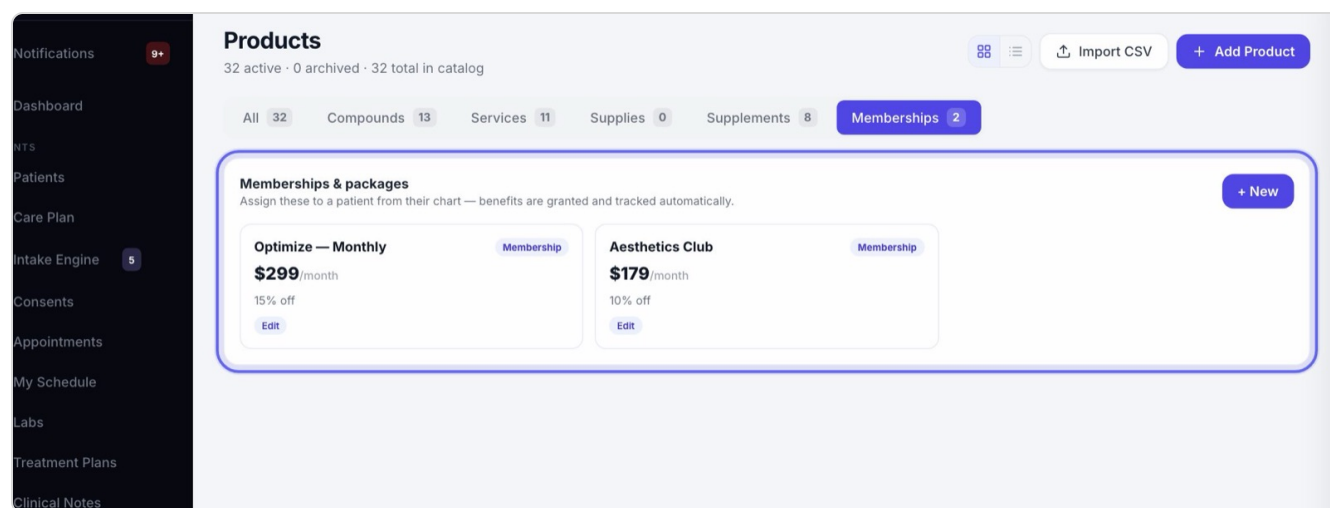
A **membership** bills every month, quarter or year. It can include visits, services on a schedule, labs, a member discount and a treatment bank.

A **package** is bought once and counts down, like 10 IV drips.

Whatever a plan includes turns into credits on the patient's chart when you give it to them. They are checked off as the patient uses them.

2. WHERE THEY LIVE

1. **Products** → **Memberships** is where you build and edit your plans.
2. The patient's chart, under **Credits & Membership**, is where you give a plan to a patient and see what they have left.
3. **Billing** → **Subscriptions** lists every patient on a plan and their next charge.

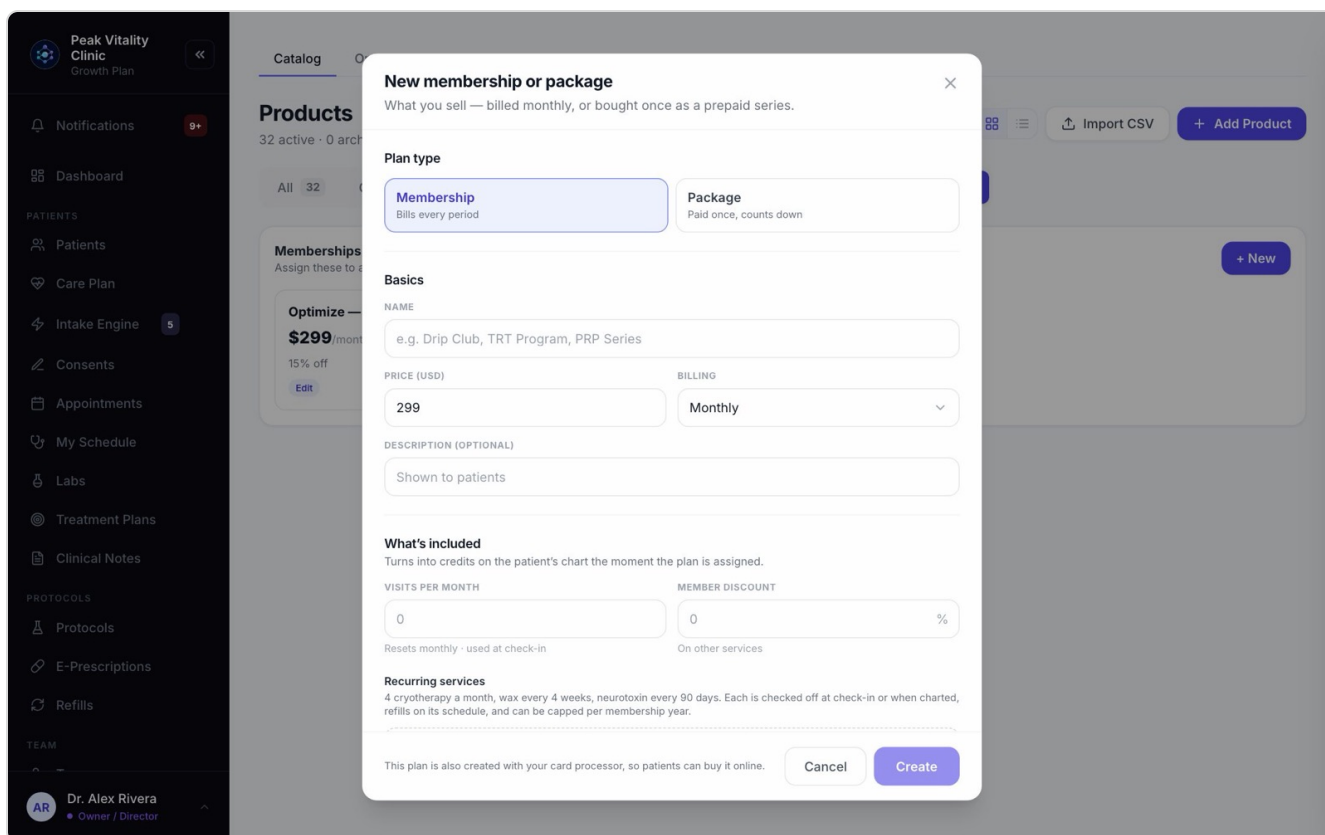


Your plans, on Products → Memberships.

3. BUILD A PLAN

Press **+ New** on the Memberships tab. Pick **Membership** or **Package**, then give it a name, a price and what it includes. Add terms and an agreement if members sign one.

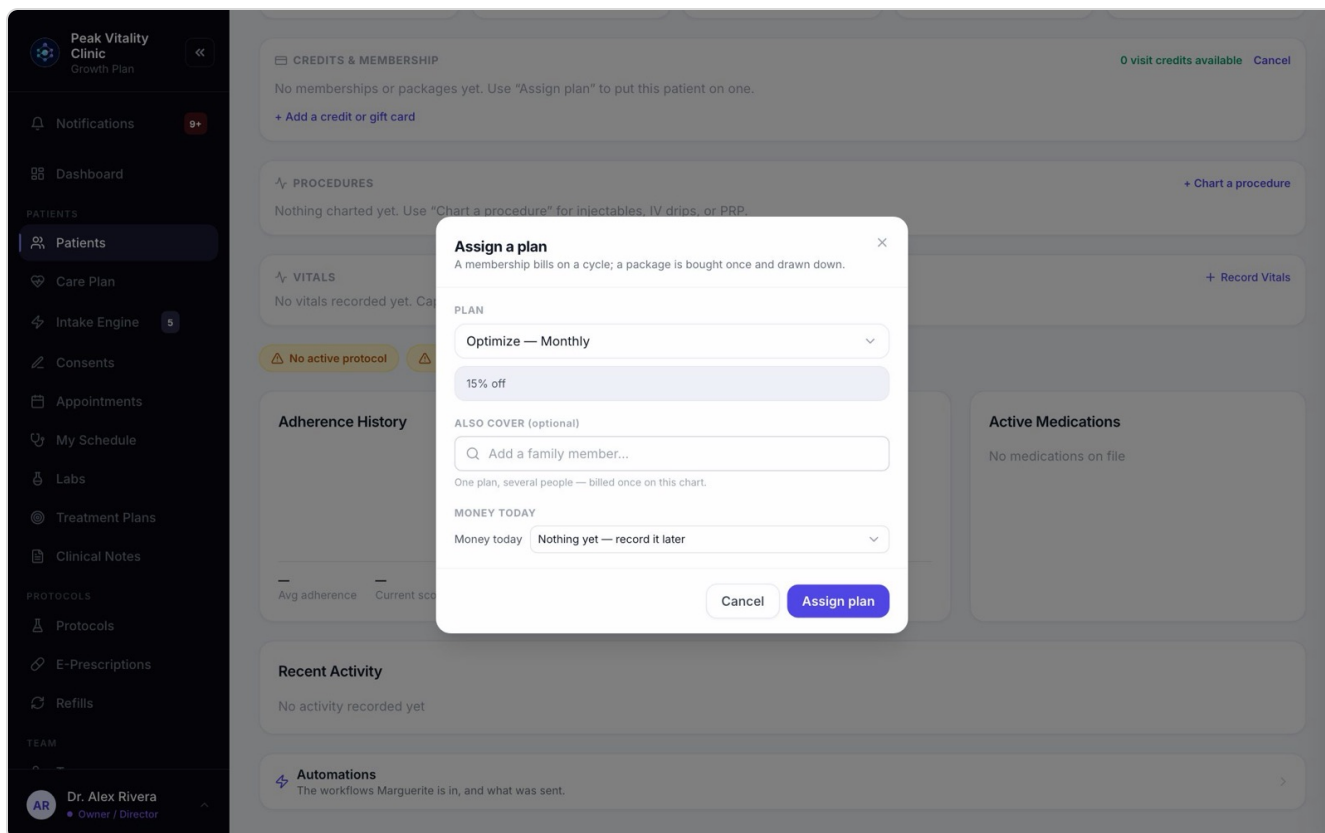
The memberships setup guide walks through every part.



The plan builder: the type, the basics, and what is included.

4. GIVE A PLAN TO A PATIENT

1. Open the patient's chart. On the Overview tab, find **Credits & Membership** and press **+ Assign plan**.
2. Pick the **Plan**. What it includes shows underneath.
3. For a membership, **Also cover** adds family members. The plan is billed once, on this patient, and each person gets the benefits on their own chart.
4. Under **Money today**, choose **Charge the card on file**, **Collected at the desk — cash or check**, **Send to the terminal now**, or **Nothing yet — record it later**.
5. Press the button. It says what it will do: **Assign plan**, **Assign & bill**, or **Send to terminal & assign**.



Assign a plan: the plan, who else it covers, and how it is paid today.

Tip. Owners, managers, billing staff and anyone who can see revenue can assign plans. A practice patient is never billed.

5. THE AGREEMENT COMES FIRST

If the plan has an agreement, it is sent to the patient as soon as they join. No repeat charge runs until they sign it.

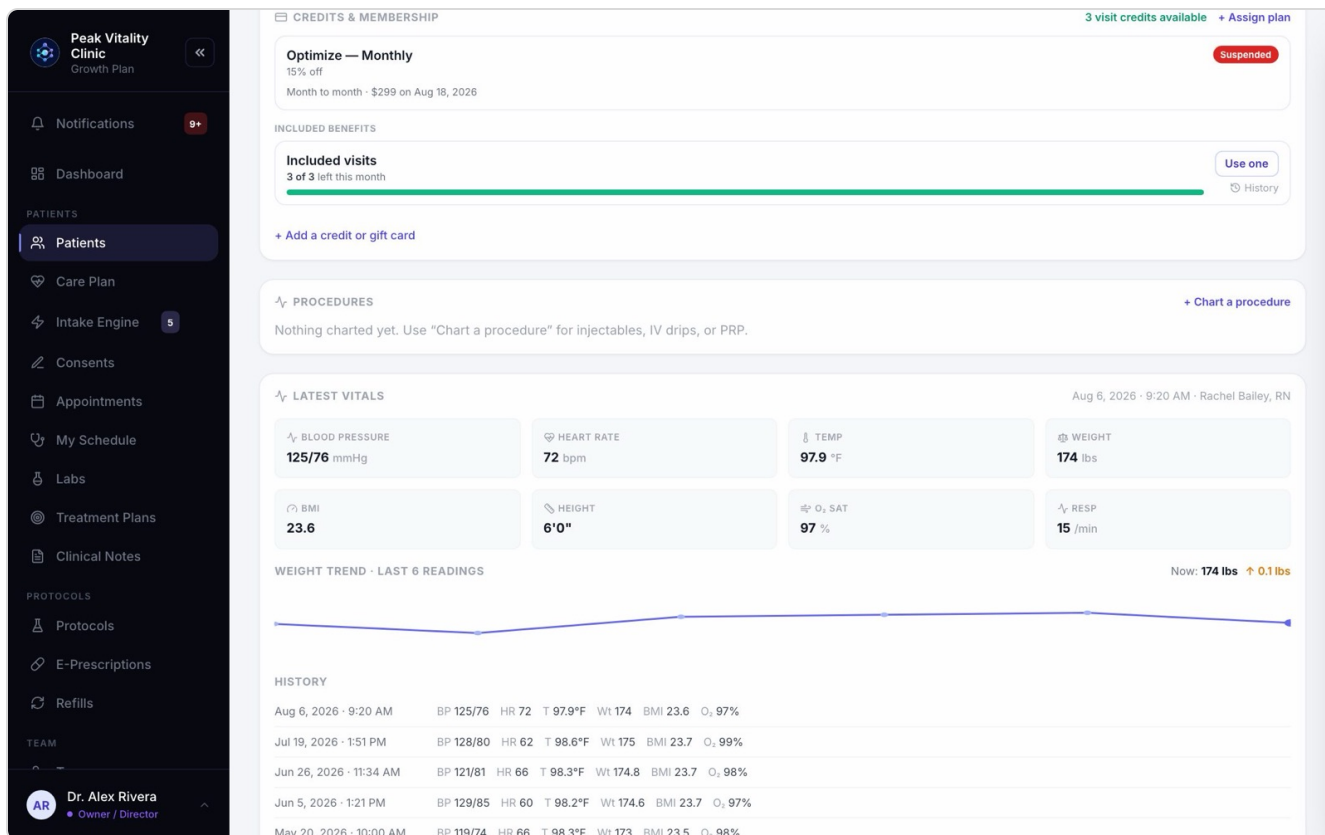
The membership card on the chart says where it stands: **Agreement sent**, **not yet signed**, or **Agreement signed**. If it couldn't be sent, you are told to send it again.

6. MORE THAN ONE PLAN

A patient can hold several plans at once, like a wax club and a neurotoxin club. They can't hold the same plan twice. Plans in the same tier group are levels of one program. Giving a patient another level offers to switch them: press **Yes — switch their plan**.

7. THE MEMBERSHIP ON THE CHART

1. Each plan the patient holds gets a card, with its state: **Active**, **Past due**, **Paused**, **Trialing** or **Suspended**.
2. Under the name: the month of the commitment, the next charge and its date, and what was paid to join.
3. If something due at the start never arrived, press **Collect** and choose how it is paid.
4. If it says **Nothing charges this membership until it has a billing date**, press **Start billing** and pick one.



Credits & Membership on the chart: the plan, its state, and the visits left this month.

8. INCLUDED VISITS

A membership's visits are held when a covered visit is booked, and used when the patient checks in. If the check-in is undone, the visit comes back.

They refill each month. **Credits & Membership** shows how many visit credits are available.

9. SERVICES, LABS AND SERIES

1. A recurring service linked to a visit type or service is checked off by itself at check-in, or when it is charted.
2. Units, like neurotoxin units, are used from the injection log.
3. Under **Included benefits** on the chart, **Use one** checks one off by hand, with a date and a note. Each use is listed, and **Undo** takes it back.
4. An included lab is used when a lab is ordered, and comes back if the order is canceled.
5. A package's series counts down one session at a time.

10. MEMBER DISCOUNT AND TREATMENT BANK

A plan's **Member discount** is taken off at checkout on its own, for as long as the patient is on the plan.

A **treatment bank** gets money after each membership payment that goes through. The patient spends it on treatments at checkout. Prescriptions and compounds are never paid from it.

11. EVERYONE ON A PLAN

1. Go to **Billing** and open the **Subscriptions** tab.
2. Filter by **Active**, **Past Due**, **Paused**, **Trialing** or **Cancelled**.
3. Tags on a row flag what needs you: **Suspended**, **Agreement unsigned**, **No billing date**, **Due in person**, and **Unused** for a member who used nothing this period.
4. Click a row to see more. The ... menu holds **Edit Amount / Cycle**, **Pause Subscription** and **Cancel Subscription**.

The screenshot displays the 'Billing & Invoicing' section of the Peak Vitality Clinic software. The left sidebar contains navigation options like Notifications, Dashboard, Patients, Care Plan, Intake Engine, Consents, Appointments, My Schedule, Labs, Treatment Plans, Clinical Notes, Protocols, E-Prescriptions, Refills, and Team. The main content area is titled 'Billing & Invoicing' and includes tabs for Invoices, Subscriptions (selected), and Insurance. A summary bar shows 'COLLECTED SEP \$10,919', 'OUTSTANDING \$3,404', 'OVERDUE 10', and 'INVOICES 18'. Below this, a 'New membership or package' button and a '+ New subscription' button are visible. A warning message states: '47 subscriptions will not be charged automatically. 47 are recorded with a billing date, but no processor and no scheduler is set to collect them. Collect manually, or connect a processor that can bill on a schedule.' The 'All Subscriptions' section features a search bar and filters for All (60), Active (40), Past Due (5), Paused (4), Trialing (7), and Cancelled (4), with 47 active results. A table lists subscriptions with columns for Patient, Protocol, Billing, Tenure, Next Charge, and Status. The table contains 9 rows of data, each with a patient name, protocol, billing amount, tenure, next charge date, and status (Not billing, Active, or Trialing).

PATIENT	PROTOCOL	BILLING	TENURE	NEXT CHARGE	STATUS
> Kevin Allen	NAD+ Longevity	\$349/mo	2 mo	Sep 1, 2026	Not billing Active
> James Smith	Semaglutide Weight Man...	\$1,197/qtr	2 mo	Oct 15, 2026	Not billing Active
> Andrew Jackson	Tirzepatide Weight Loss	\$499/mo	2 mo	Sep 22, 2026	Not billing Active
> Verity Thomas	Peptide Recovery Stack	\$349/mo	2 mo	Sep 13, 2026	Not billing Active
> Sofia Marchetti	NAD+ Longevity	\$349/mo	2 mo	Sep 20, 2026	Not billing Active
> Rowan Davis	Tirzepatide Weight Loss	\$499/mo	2 mo	Aug 27, 2026	Not billing Active
> Susan Rodriguez	NAD+ Longevity	\$1,047/qtr	3 mo	Sep 25, 2026	Not billing Active
> Andre Davis	TRT Optimization	\$299/mo	3 mo	Aug 31, 2026	Not billing Trialing

Billing → Subscriptions: every patient on a plan, and their next charge.

12. WHEN A PAYMENT IS DECLINED

A declined payment makes the membership **Past due**. The chart shows the day its benefits pause, which is the plan's grace days after the decline.

After that, it reads **Suspended**, and its benefits are paused. A payment that goes through makes it active again.

13. MEDICATION PLANS

A plan whose price includes a medication is never charged to a card on file. When a period is due, the membership reads **Due in person**.

Press **Collect this period** on the chart, or **Collect** on the Subscriptions list. Take it on the terminal, or as cash or a check.

14. CANCEL A MEMBERSHIP

1. On Billing → Subscriptions, open the row's ... menu and pick **Cancel Subscription**.
2. If the patient is still inside their commitment, the box works out what the agreement says they owe: what they used at your regular prices, what they paid, and their deposit.
3. Nothing is charged there. Collect it, invoice it or waive it, as you decide.
4. Type the **Reason for cancellation** and press **Cancel**. Future billing stops. **Keep Subscription** closes the box without canceling.

15. WHAT THE PATIENT SEES

In their app, patients see each membership they hold and what it includes. They see how many of each benefit they have left, and when the next one is ready.

Depending on how your card payments are set up, patients may also join a plan from their app. The note in the plan builder tells you whether they can.