

# Set up memberships and packages

Build each plan you sell once: its price, what it includes, and its terms. Then it is ready to give to any patient from their chart.

Setup guide · For Owners, Managers · [aminova.health/university/memberships-setup](https://aminova.health/university/memberships-setup)

## 1. MEMBERSHIPS AND PACKAGES

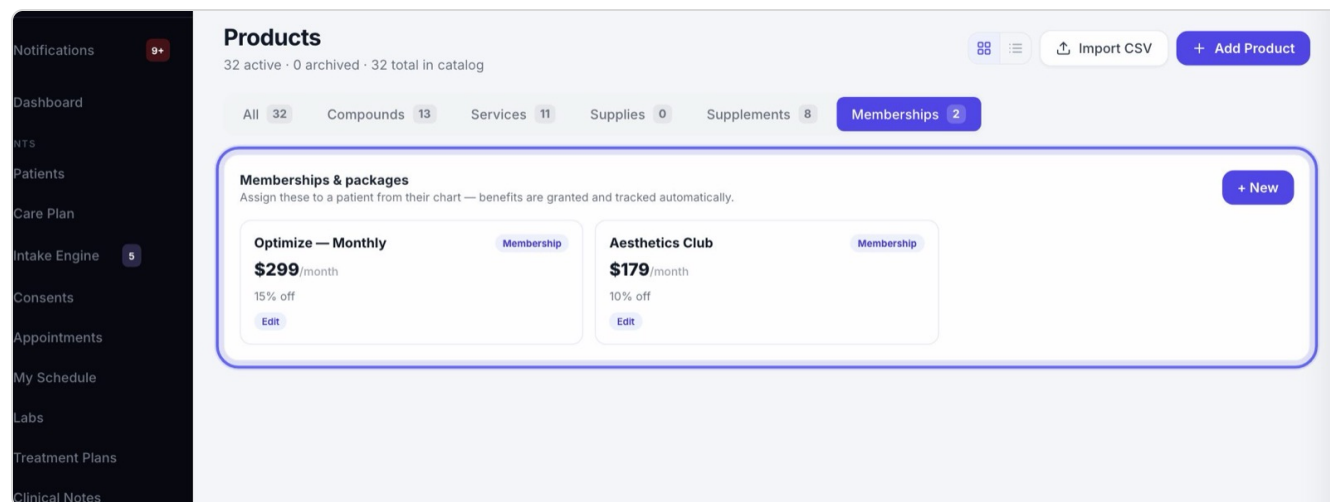
A **membership** bills again and again, every month, quarter or year. It can include visits, services, labs, a discount and money to spend on treatments.

A **package** is paid once and counts down as it is used, like 10 IV drips or 3 PRP sessions.

If members sign an agreement, make it first as a consent form. You pick it while building the plan.

## 2. OPEN THE PLAN BUILDER

1. Go to **Products** and click the **Memberships** tab.
2. Press **+ New**.
3. You can also start one from **Billing** → **Subscriptions** with **New membership or package**. Both make the same plan.



Products → Memberships: every plan you sell. + New starts one.

## 3. PICK THE PLAN TYPE

1. Under **Plan type**, pick **Membership** (bills every period) or **Package** (paid once, counts down).
2. The rest of the form changes to fit. A package skips the parts that only make sense for billing on repeat.

New membership or package: the plan type comes first.

#### 4. THE BASICS

1. Give it a **Name**, like “Drip Club” or “PRP Series”.
2. Set the **Price (USD)**. For a membership, pick the **Billing: Monthly, Quarterly or Annual**.
3. Add a **Description (optional)**. Patients see it.
4. If the name sounds like a hormone plan, like TRT or HRT, you are asked whether the price includes the medication. Answer it to save.

#### 5. VISITS AND MEMBER DISCOUNT

1. **Visits per month** is how many visits a member gets. They refill each month and are used when the patient checks in.
2. Under **Visits count for**, add the visit types they cover. Left empty, they cover any regular visit.
3. **Member discount** is a percent off your other services. Members get it at checkout on their own.

**New membership or package** ×

What you sell — billed monthly, or bought once as a prepaid series.

**What's included**  
Turns into credits on the patient's chart the moment the plan is assigned.

VISITS PER MONTH:  MEMBER DISCOUNT:  %

☐ Resets monthly - used at check-in ☐ On other services

**Recurring services**  
4 cryotherapy a month, wax every 4 weeks, neurotoxin every 90 days. Each is checked off at check-in or when charted, refills on its schedule, and can be capped per membership year.

[+ Add a recurring service](#)

**Labs included**  
Four panels a year, one a month — a count the patient can use. One is used when a lab is ordered, and comes back if the order is cancelled.

[+ Add included labs](#)

**Prepaid series**  
Sessions that count down as they are used — a 10-drip package, PRP x3, laser x6.

[+ Add a prepaid series](#)

**Treatment bank**  
Money that goes in after each successful payment and is spent on treatments at checkout.

[+ Add a treatment bank](#)

**Terms & agreement** Optional ▾

This plan is also created with your card processor, so patients can buy it online.

[Cancel](#) [Create](#)

What's included: visits, a member discount, and more below.

**Tip.** Everything under What's included turns into credits on the patient's chart the moment the plan is given to them.

## 6. RECURRING SERVICES

1. Press **Add a recurring service** for each one, like 4 cryotherapy a month or a wax every 4 weeks.
2. Fill in the **Service name**, **How many** and **How often**.
3. For something counted in units, like neurotoxin, pick the **Product it uses**, the **Units per visit** and the **Price per unit**. The units are used from the injection log.
4. Set a **Max per membership year** if there is a yearly limit.
5. Under **Counts when**, add the **+ visit type** or **+ service** that uses it. Then check-in and charting check it off by themselves.

**Peak Vitality Clinic**  
Growth Plan

Notifications 9+

Dashboard

PATIENTS

Patients

Care Plan

Intake Engine 5

Consents

Appointments

My Schedule

Labs

Treatment Plans

Clinical Notes

PROTOCOLS

Protocols

E-Prescriptions

Refills

TEAM

Dr. Alex Rivera  
Owner / Director

**New membership or package**

What you sell — billed monthly, or bought once as a prepaid series.

**Recurring services**  
4 cryotherapy a month, wax every 4 weeks, neurotoxin every 90 days. Each is checked off at check-in or when charted, refills on its schedule, and can be capped per membership year.

**Service 1** Remove

SERVICE NAME  
e.g. Cryotherapy, Red light, Brazilian wax

HOW MANY HOW OFTEN PRODUCT IT USES (OPTIONAL)  
1 per month Visit only — no product

UNITS PER VISIT PRICE PER UNIT MAX PER MEMBERSHIP YEAR  
0 \$ 0.00 No limit

Units and the price per unit apply once a product is chosen — the units are spent at the injection log.

Counts when + visit type + service  
+ link a visit type or service so check-in and charting check it off by themselves

+ Add a recurring service

**Labs included**  
Four panels a year, one a month — a count the patient can use. One is used when a lab is ordered, and comes back if the order is cancelled.

+ Add included labs

**Prepaid series**  
Sessions that count down as they are used — a 10-drip package, PRP x3, laser x6.

This plan is also created with your card processor, so patients can buy it online.

Cancel Create

A recurring service: how many, how often, and what uses it.

## 7. LABS INCLUDED

1. Press **Add included labs**.
2. Fill in **What the patient sees**, **How many** and **How often**, like 4 per year.
3. Leave **Only these panels (optional)** empty to cover any lab. Or name panels to limit it.
4. One is used when a lab is ordered, and comes back if the order is canceled.

## 8. PREPAID SERIES

1. Press **Add a prepaid series**. This is the heart of a package.
2. Type the **Series name** and how many **Sessions**, like IV drip and 10.
3. Under **Counts when**, link the visit type or service it covers. Left unlinked, it covers any regular visit.

## 9. TREATMENT BANK (OPTIONAL)

1. Press **Add a treatment bank** to put money into the member's bank after each payment.
2. Set **Added each payment (USD)** and, if you want one, a **Balance cap (optional)**.
3. Choose whether **Unused money Rolls over** or **Ends each period**.
4. Under **Can be spent on**, pick **Any service or product** or **Only these** categories.
5. Choose what happens **If the membership is cancelled**: **Patient keeps it** or **Forfeited**.

**Tip.** Money goes in only after a payment goes through, never at sign-up. Prescriptions and compounds are never paid from the bank.

## 10. TERMS AND AGREEMENT

1. Click **Terms & agreement** to open it.
2. **Commitment** is how long they sign up for, from **Month to month** to **24 months**.
3. Set anything **Due at enrollment (USD)**, **What that is called**, and any **Deposit held (USD)**. Tick the box if the first period is also due at enrollment.
4. **Grace after a decline** is how many days a member keeps their benefits after a card is declined.
5. Pick the **Membership agreement**. It is sent to the patient as soon as they join. No repeat charge runs until they sign it.
6. Plans that are levels of one program, like 30, 60 and 90 units, share a **Tier group**. A patient then switches between them instead of holding two.

**New membership or package**

What you sell — billed monthly, or bought once as a prepaid series.

**Terms & agreement** Hide

What is due at enrollment, how long the commitment runs, and the agreement the patient signs.

**TIER GROUP** e.g. Soft Life (30 / 60 / 90)

Plans in one group are tiers: a patient switches between them instead of holding two.

**COMMITMENT** Month to month

**DUE AT ENROLLMENT (USD)** 0.00

**WHAT THAT IS CALLED** Enrollment payment, Initial evaluation...

**DEPOSIT HELD (USD)** 0.00

**GRACE AFTER A DECLINE** 7 days, then benefits pause

☐ **First month is also due at enrollment.** Leave off when the first recurring charge comes one month after enrollment.

**MEMBERSHIP AGREEMENT** No agreement

Sent to the patient the moment they are enrolled. No recurring charge runs until it is signed — the signature is the authorisation.

**Medication plan**

☐ **This plan is for a medication (e.g. GLP-1 / TRT).** Tick this and there is nowhere in Aminova to take the payment yet.

This plan is also created with your card processor, so patients can buy it online.

Cancel Create

Terms & agreement: the commitment, what is due to join, and the agreement to sign.

## 11. MEDICATION PLANS

If the price includes a medication, like a GLP-1 or TRT, tick **This plan is for a medication (e.g. GLP-1 / TRT)**. A medication plan is never charged to a card on file. Each period is collected in person.

The note under the box tells you how your clinic can take that payment.

## 12. CREATE IT

1. Read the note beside the button. It says where the plan can be sold once it is saved.
2. Press **Create**. The plan shows on the Memberships tab.
3. To change it later, press **Edit** on it, then **Save changes**. If you change the price, you choose whether to **Apply the new price to current members**. Left off, they keep the price they joined at.

## 13. GIVE IT TO A PATIENT

Open the patient's chart. On the Overview tab, find **Credits & Membership** and press **+ Assign plan**.

The Memberships and packages manual walks through that, and everything that happens after.

The screenshot displays the Peak Vitality Clinic patient chart interface. On the left is a dark sidebar with navigation options: Notifications (9+), Dashboard, PATIENTS (Patients, Care Plan, Intake Engine (5), Consents, Appointments, My Schedule, Labs, Treatment Plans, Clinical Notes), PROTOCOLS (Protocols, E-Prescriptions, Refills), and TEAM (Dr. Alex Rivera, Owner / Director). The main content area is titled 'CREDITS & MEMBERSHIP' and shows '0 visit credits available' with a '+ Assign plan' button. Below this are sections for PROCEDURES (+ Chart a procedure), VITALS (+ Record Vitals), and two warning banners: 'No active protocol' and 'No labs on file'. The 'Adherence History' section shows 'No active protocol assigned' with a chart for Avg adherence, Current score, and Protocol week. The 'Active Medications' section shows 'No medications on file'. The 'Recent Activity' section shows 'No activity recorded yet'. The 'Automations' section shows 'The workflows Marguerite is in, and what was sent.' with a right arrow.

Credits & Membership on the chart, where a plan is given to a patient.