

Weekly Membership Renewal Checklist

A simple weekly routine to recover renewals and keep your member list accurate.

Week of: _____

Completed by: _____

01 REVIEW EXPIRED MEMBERS

- ☐ Open Members > Expired Members in your Smile Advantage dashboard.
- ☐ Review each expired membership and note who needs follow-up.

02 CHECK WHAT PREVENTED RENEWAL

- ☐ Verify email/contact details and whether anyone has reached out.
- ☐ Check for an expired or failed payment method.
- ☐ Check whether the membership was a one-time purchase.
- ☐ Confirm whether the patient is still active in your practice.

03 RECONNECT WITH PATIENTS

- ☐ Personally follow up with patients who may want to renew.
- ☐ Explain membership benefits and offer help with renewal.
- ☐ Discuss AutoPay for one-time members, with patient authorization.

04 COMPLETE RENEWALS

- ☐ Open the member profile and select Renew Membership.
- ☐ Update payment information if needed; review charges and options.
- ☐ Complete renewal and verify the membership shows as Active.

05 CLEAN UP INACTIVE RECORDS

- ☐ Confirm whether non-renewing patients are leaving the program.
- ☐ Cancel when appropriate and verify no future payments are scheduled.
- ☐ Archive records for patients no longer active with the practice.

WEEKLY RESULTS

Expired reviewed: _____ Patients contacted: _____ Renewals completed: _____

Records cleaned up: _____ Follow-ups carried into next week: _____

TIP Review this list weekly. Expired memberships are automatically canceled after 365 days past due.

Full walkthrough: smileadvantage.com/academy/managing-expired-memberships/