

# Clinical Notes

Every note for every patient, in one place. Write a note, sign it, find it again later, and change a signed note the right way.

Page manual · For Owners, Managers, Providers, Nurses · [aminova.health/university/clinical-notes](https://aminova.health/university/clinical-notes)

## 1. THE PAGE AT A GLANCE

On the left is every note, grouped by patient, with a search box and filters on top. On the right is the note you have open.

Notes made in other places land here too, like a signed treatment plan or a lab review.

**Clinical Notes**  
Session notes per patient — synced from appointments, labs, and direct entry

Search note text, patients, provide

All SOAP Progress Lab Review

Consult Procedure

All Providers

- SM Sofia Marchetti 2 sessions
- MR Marcus Reed 2 sessions
- RK Rebecca King 1 session
- CA Curtis Anderson 3 sessions
- GM Grant Miller 1 session
- CT Christopher Tay... 3 sessions
- GJ Grant Jones 3 sessions
- MW Miles Williams 1 session
- JT Jessica Thomas 1 session
- EY Emily Young 1 session

**Sofia Marchetti** 1/2

Procedure Note Sep 14 · Dr. Maya Chen Signed · Sep 15 Shared with patient

Last edited 12d ago

Print Co-sign Request co-sign Amend

ICD-10 TAGS

**S — Subjective** Patient-reported symptoms and history Sep 15, 2026

Follow-up. Asks about adjusting the timing of the dose.

**O — Objective** Clinical findings and measurements Sep 15, 2026

BP 122/83, HR 72, weight 139.1 lb. Well-appearing, no acute distress. Injection sites clean and without induration.

**A — Assessment** Clinical impression and diagnosis Sep 15, 2026

On track. Continue monitoring.

**P — Plan** Treatment plan and follow-up Sep 15, 2026

Continue current protocol. Recheck labs at the scheduled interval.

Clinical Notes: the notes by patient on the left, the open note on the right.

## 2. WRITE A NOTE

1. Click **New Note**.
2. Under **Patient**, search for the patient and click their name.
3. Pick the kind of note under **Note Type**. The boxes below change to fit it.

4. Check the **Session Date**. The **Provider** is you, the person signed in. You can't write a note under someone else's name.
5. Type in each box. If you have dot phrases, type one and press Tab to fill in its text.

New Clinical Note: the patient, the kind of note, the date, then one box per part of the note.

### 3. KINDS OF NOTE

Most kinds use the four SOAP boxes: **Subjective** (what the patient tells you), **Objective** (what you find), **Assessment** (what you think) and **Plan** (what happens next).

A few have their own boxes. **Lab Review** asks for the results, what they mean, and what to do next. **Intake Note** starts with the history and the exam. **Clinical Update** is for a call or message between visits: what was reported, what you think, and the action you took.

Your clinic's own note layouts are in the same list. More on those below.

### 4. CODES, TAGS AND WHO SEES IT

1. Under **ICD-10 Codes**, search for a diagnosis code and click it to add it.
2. For some kinds of note, **Suggested Billing Codes (CPT)** offers billing codes. Click one to add it. Check it against the note before you bill.
3. Under **Tags**, type a word and press Enter. Tags help you find the note later.
4. The box at the bottom left says **Provider-only** until you tick it. Tick it to make it **Shared with patient**.

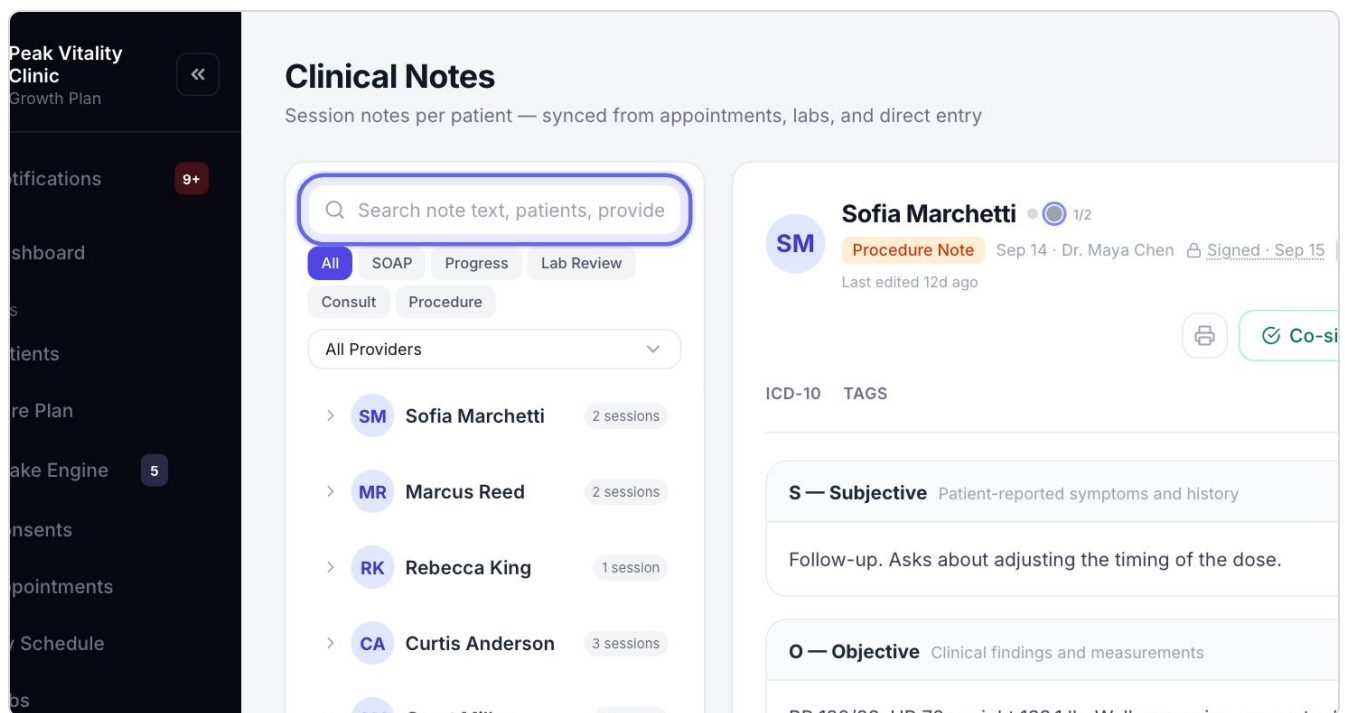
## 5. SAVE A DRAFT, OR SIGN

1. **Save as Draft** keeps the note open to change later.
2. **Save & Sign** signs it now. Draw or type your signature, then press **Apply Signature**.
3. A signed note is locked. After that, any change is added as an amendment.

**Tip.** Nothing is saved until you press one of the two save buttons. If a save fails, the note stays open with everything you typed.

## 6. SEARCH EVERY NOTE

Type in the search box to find a patient, a provider or a tag. From two letters on, it also looks inside the text of every note, and shows the line where it found your words.



Search looks inside the notes, not just at names.

## 7. NARROW THE LIST

1. The buttons under the search show one kind of note at a time, like **Lab Review**. There is a button for each kind you have.
2. **All** shows every kind again.
3. Click **All Providers** and pick a name to see only the notes that person wrote.

**Peak Vitality Clinic**  
Growth Plan

**Clinical Notes**  
Session notes per patient — synced from appointments, labs, and direct entry

Search note text, patients, provide

All SOAP Progress Lab Review  
Consult Procedure

All Providers

- SM Sofia Marchetti 2 sessions
- MR Marcus Reed 2 sessions
- RK Rebecca King 1 session
- CA Curtis Anderson 3 sessions
- GM Grant Miller 1 session

**Sofia Marchetti** 1/2  
Procedure Note Sep 14 · Dr. Maya Chen Signed · Sep 15  
Last edited 12d ago

ICD-10 TAGS

**S — Subjective** Patient-reported symptoms and history  
Follow-up. Asks about adjusting the timing of the dose.

**O — Objective** Clinical findings and measurements  
BP 122/83, HR 72, weight 139.1 lb. Well-appearing, no acute d  
induction

Pick a kind of note to see only those.

## 8. NOTES BY PATIENT

1. Each patient is one row, with how many notes they have. Click the row to show their notes.
2. Each note shows its kind, date and provider.
3. A lock means signed. **draft** means not signed yet. **co-sign** means it is waiting on a co-signature, and **amended** means it was changed after signing.
4. Click a note to open it on the right.

**Peak Vitality Clinic**  
Growth Plan

**Clinical Notes**  
Session notes per patient — synced from appointments, labs, and direct entry

**Sofia Marchetti** 2 sessions

- Procedure Note** Sep 14 Maya Chen
- Consult Note** May 19 Alex Rivera

**MR Marcus Reed** 2 sessions

**RK Rebecca King** 1 session

**CA Curtis Anderson** 3 sessions

**GM Grant Miller** 1 session

**CT Christopher Tay...** 3 sessions

**GJ Grant Jones** 3 sessions

**MW Miles Williams** 1 session

**JT Jessica Thomas** 1 session

**EY Emily Young** 1 session

**OW Otis Walker** 1 session

**Sofia Marchetti** 1/2  
Sep 14 · Dr. Maya Chen Signed · Sep 15  
Last edited 12d ago

ICD-10 TAGS

**S — Subjective** Patient-reported symptoms and history  
Follow-up. Asks about adjusting the timing of the dose.

**O — Objective** Clinical findings and measurements  
BP 122/83, HR 72, weight 139.1 lb. Well-appearing, no acute induration.

**A — Assessment** Clinical impression and diagnosis  
On track. Continue monitoring.

**P — Plan** Treatment plan and follow-up  
Continue current protocol. Recheck labs at the scheduled interval.

Dr. Alex Rivera  
Owner / Director

Click a patient to see their notes, newest first.

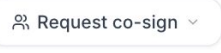
## 9. READ A NOTE

1. At the top: the patient, the kind of note, the date and who wrote it.
2. It says **Draft — unsigned**, or who signed it and when. Click the signed line to see the signature.
3. Each part of the note sits in its own box.
4. If the patient has other notes, small dots next to their name stand for each one. Click a dot to jump to that note.
5. If the note came from somewhere else, like a lab, click **View source** to open where it came from.

gress Lab Review

Last edited 12d ago






ICD-10 TAGS

**S — Subjective** Patient-reported symptoms and history ● Sep 15, 2026

Follow-up. Asks about adjusting the timing of the dose.

**O — Objective** Clinical findings and measurements Sep 15, 2026

BP 122/83, HR 72, weight 139.1 lb. Well-appearing, no acute distress. Injection sites clean and without induration.

**A — Assessment** Clinical impression and diagnosis ● Sep 15, 2026

On track. Continue monitoring.

**P — Plan** Treatment plan and follow-up ● Sep 15, 2026

Continue current protocol. Recheck labs at the scheduled interval.

Each part of the note in its own box.

## 10. EDIT, SIGN AND PRINT

1. On a draft, click **Edit**. Changes save as you type. Press **Save** when you're done, or **Cancel**.
2. Only the person who wrote a note can edit it. An owner or manager can finish someone else's draft.
3. Click **Sign & Lock** when the note is done, and sign.
4. The printer button opens the note as a PDF to print or download.

direct entry

ia Marchetti 1/2

Procedure Note Sep 14 · Dr. Maya Chen Signed · Sep 15 Shared with patient

edited 12d ago



Co-sign



Request co-sign



Amend

Active Patient-reported symptoms and history

Sep 15, 2026

Asks about adjusting the timing of the dose.

Active Clinical findings and measurements

Sep 15, 2026

HR 72, weight 139.1 lb. Well-appearing, no acute distress. Injection sites clean and without

The buttons on a signed note: print, co-sign, request a co-sign, or amend. A draft shows Edit and Sign & Lock.

## 11. CODES AND TAGS

The diagnosis codes and tags on the note sit above its text. While you edit a draft, you can add or remove them here.

text, patients, provide

gress Lab Review

re

Marchetti 2 sessions

s Reed 2 sessions

ca King 1 session

Maya Chen

Anderson 3 sessions

Miller 1 session

**Rebecca King**

**SOAP Note** Aug 7 · Dr. Maya Chen Signed · Aug 8 Shared with patient

Last edited 12d ago

Co-sign Request co-sign Amendments closed

ICD-10 E29.1 TAGS New-Patient

**S — Subjective** Patient-reported symptoms and history Sep 15, 2026

Scheduled review. Adherence has been good.

**O — Objective** Clinical findings and measurements Sep 15, 2026

BP 131/77, HR 73, weight 155.8 lb. Well-appearing, no acute distress. Injection sites clean and without induration.

**A — Assessment** Clinical impression and diagnosis Sep 15, 2026

The note's diagnosis codes and tags.

## 12. WHO CAN SEE A NOTE

A note starts as **Provider-only**. Only you can see it: not the patient, and not the rest of your team either.

On the open note, click **Provider-only** to switch it to **Shared with patient**. Then the patient and your team can see it. You can switch it back at any time, even on a signed note.

**Tip.** If a colleague can't find a note you wrote, check this first. A Provider-only note is hidden from them too.

## 13. CHANGE A SIGNED NOTE

1. Open the signed note and click **Amend**.
2. Write the **Reason for Amendment**. It is required.
3. Change the parts that need it. Each changed part is marked **edited**. You can also add an **Amendment Summary Note**.
4. Press **Save Amendment**. The original note stays exactly as it was signed.
5. The change is listed at the bottom, in the **Amendment Trail**, with who, when, why, and the before and after.

**Tip.** Amendments close 30 days after a note is signed. The button then reads **Amendments closed**.

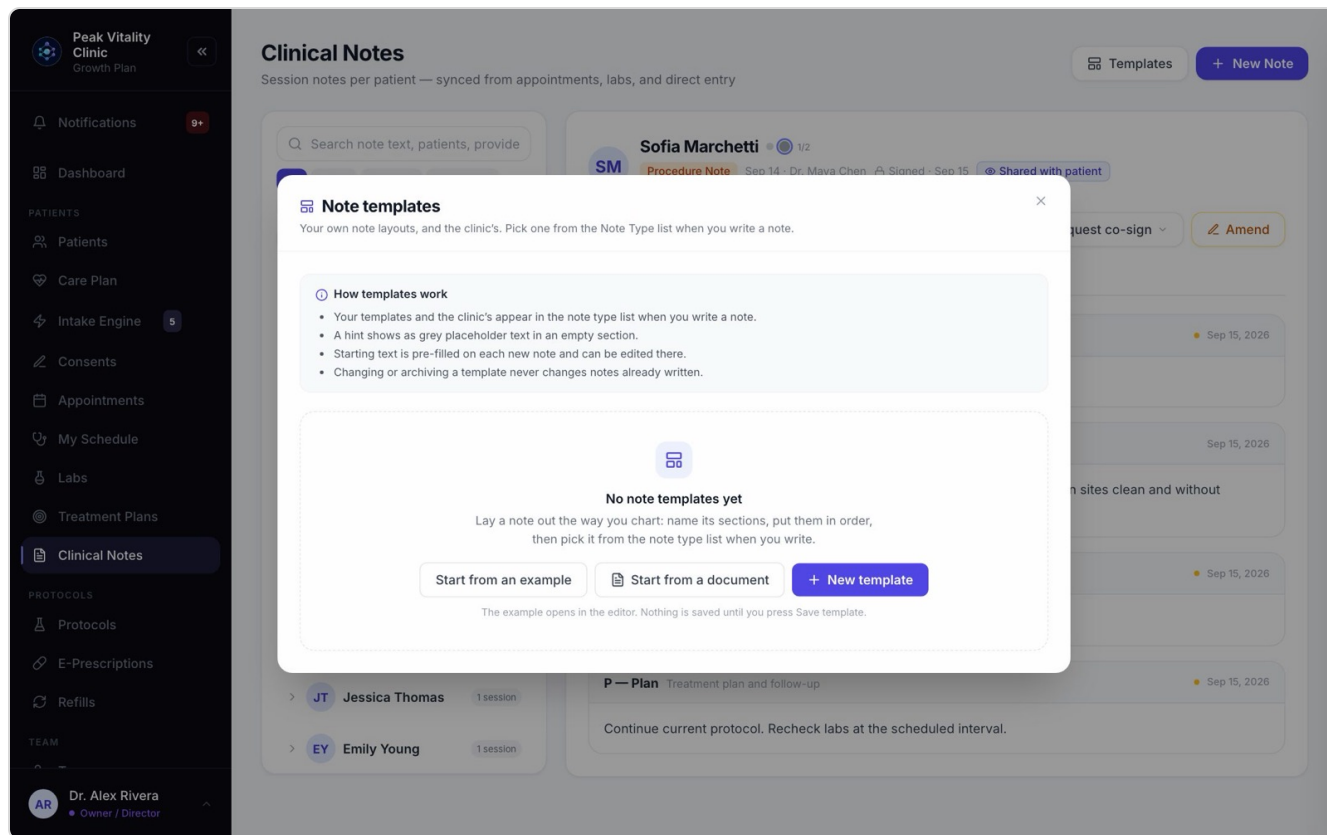
## 14. CO-SIGNATURES

1. On a signed note, click **Request co-sign** and pick who should review it. It goes into their notifications.
2. The note then says who it is waiting on.
3. An owner, manager or physician who didn't write the note sees **Co-sign**. They press it and sign as themselves.

## 15. YOUR NOTE LAYOUTS

Click **Templates** to see your note layouts. **Clinic templates** are for everyone. **Your templates** are only for you.

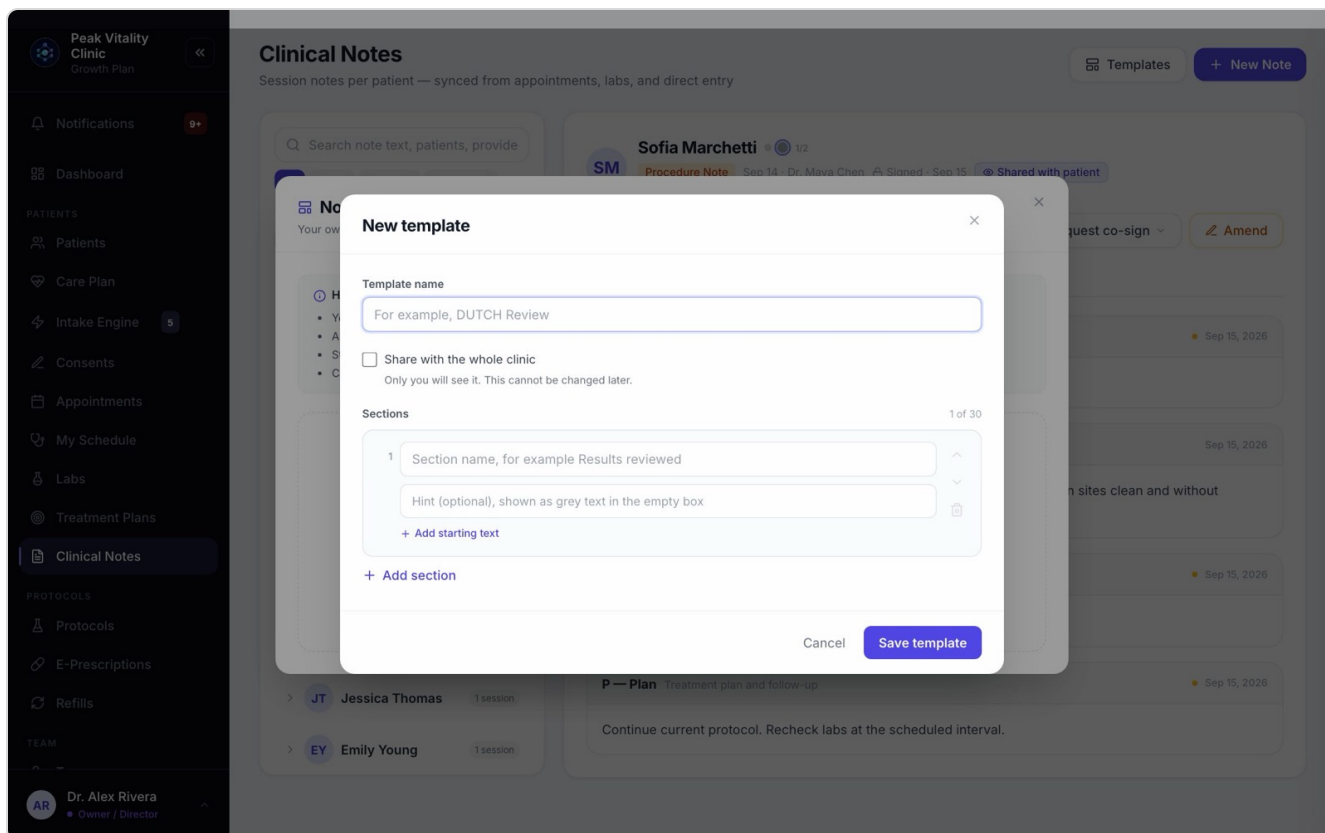
On each one: **Edit**, **Make my default** so your notes start with it, or **Archive** to stop offering it. Changing or archiving a layout never changes notes already written.



Note templates. With none made yet, start from an example, from a document, or from scratch.

## 16. MAKE A LAYOUT

1. In **Templates**, click **New template**. Or click **Start from a document** to turn the headings of a blank form in Documents into sections.
2. Give it a **Template name**. Tick **Share with the whole clinic** to make it for everyone. You can't change this later.
3. Name each section. Add a hint if you like: gray text that shows in the empty box.
4. Press **Add starting text** for words that should already be filled in. Use the arrows to put the sections in order, and **Add section** for more.
5. Press **Save template**. It now shows in the **Note Type** list when you write a note.



A layout is a name and its sections, in order.