

Set up your consent forms

Bring in the consent PDFs you use today, place the signature boxes, and decide who signs each one and how often. Then attach them to your visit types.

Setup guide · For Owners, Managers · aminova.health/university/consent-forms

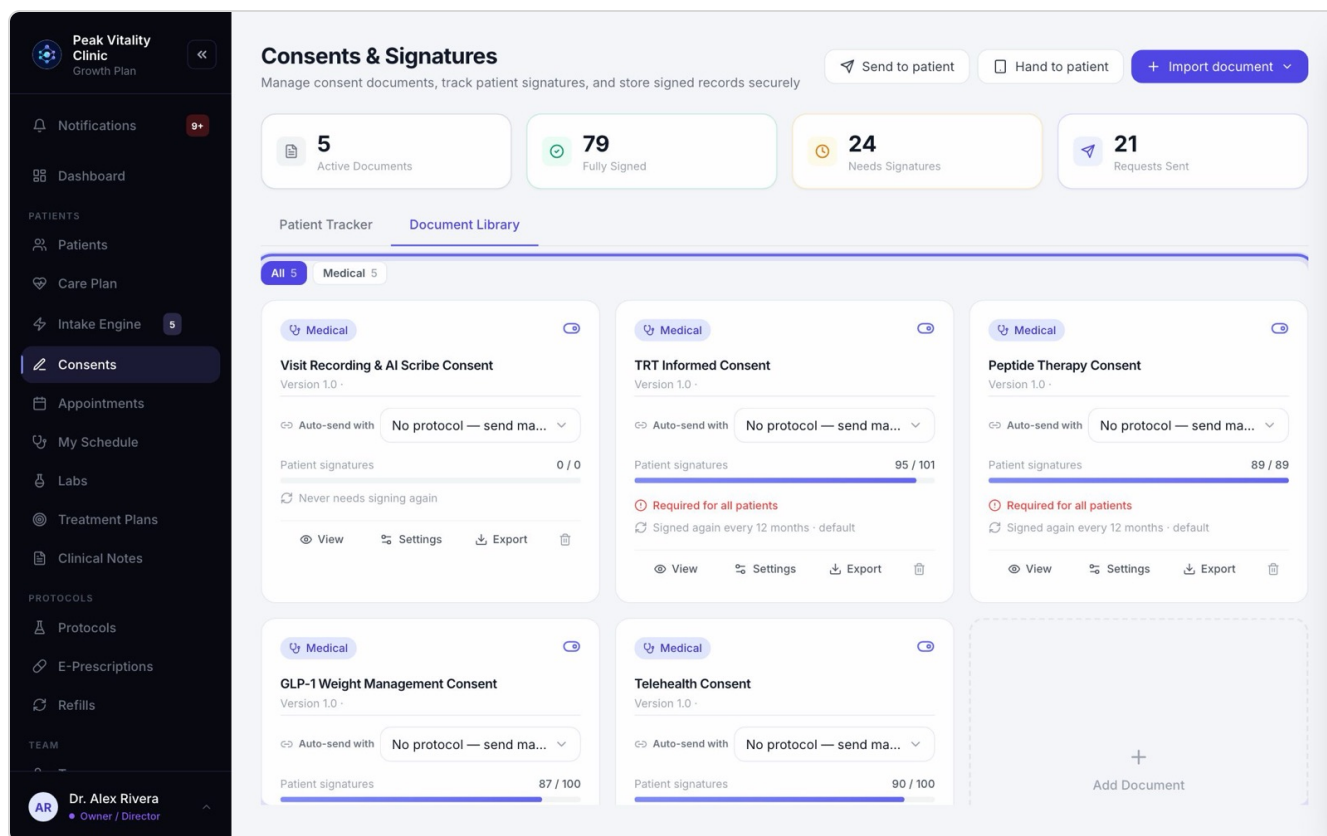
1. WHAT YOU'LL SET UP

A consent form is a document the patient signs, like a treatment consent or a financial policy. Each one lives in your **Document Library**, with boxes placed where the patient, and sometimes the clinic, signs.

When you're done, patients sign them in their patient app or on a tablet in the office, and they come round again when they need renewing.

2. OPEN THE DOCUMENT LIBRARY

1. Go to **Consents** in the sidebar.
2. Click the **Document Library** tab. Each form is a card.



Consents → Document Library holds every consent form.

3. UPLOAD ONE PDF

1. Click **Import document**, then **Upload a PDF**.
2. Drop in the PDF, or click to choose it.
3. Check the **Document Name**, and pick a **Category**. You can type a category of your own.
4. Under **Who should sign it?**, choose **Add to library only**, **Assign to one patient**, or **Required for all patients**. Not sure? Pick the first. You can change it later.
5. Press **Continue**.

The screenshot shows the 'Import Document' modal in the Peak Vitality Clinic interface. The modal is titled 'Import Document' and 'Step 1 of 2 - Upload -> next you'll place signature fields'. It contains a dashed box for dropping a PDF, a text field for 'Document Name' (e.g., 'Informed Consent - New Treatment'), a dropdown for 'Category' (Medical), and radio buttons for 'Who should sign it?' (Add to library only, Assign to one patient, Required for all patients). The background shows a 'Consents & Signatures' dashboard with a patient list and a table of consent documents.

PATIENT	Document	STATUS	LAST ACTIVITY
AW Adriana Wright		Complete	Jun 13, 2026
AM Amanda Martin		Complete	Jul 19, 2026
AD Andre Davis		Complete	Jul 26, 2026
AL Andre Lewis		Complete	Jun 13, 2026
AJ Andrew Jackson		Complete	Jun 14, 2026
AN Anthony Nguyen		Partial	Jul 29, 2026
AH Ashley Harris		Complete	Jun 7, 2026
BL Bennett Lopez		Complete	Jun 5, 2026

Import Document: the file, its name, its category, and who signs it.

4. PLACE THE SIGNATURE BOXES

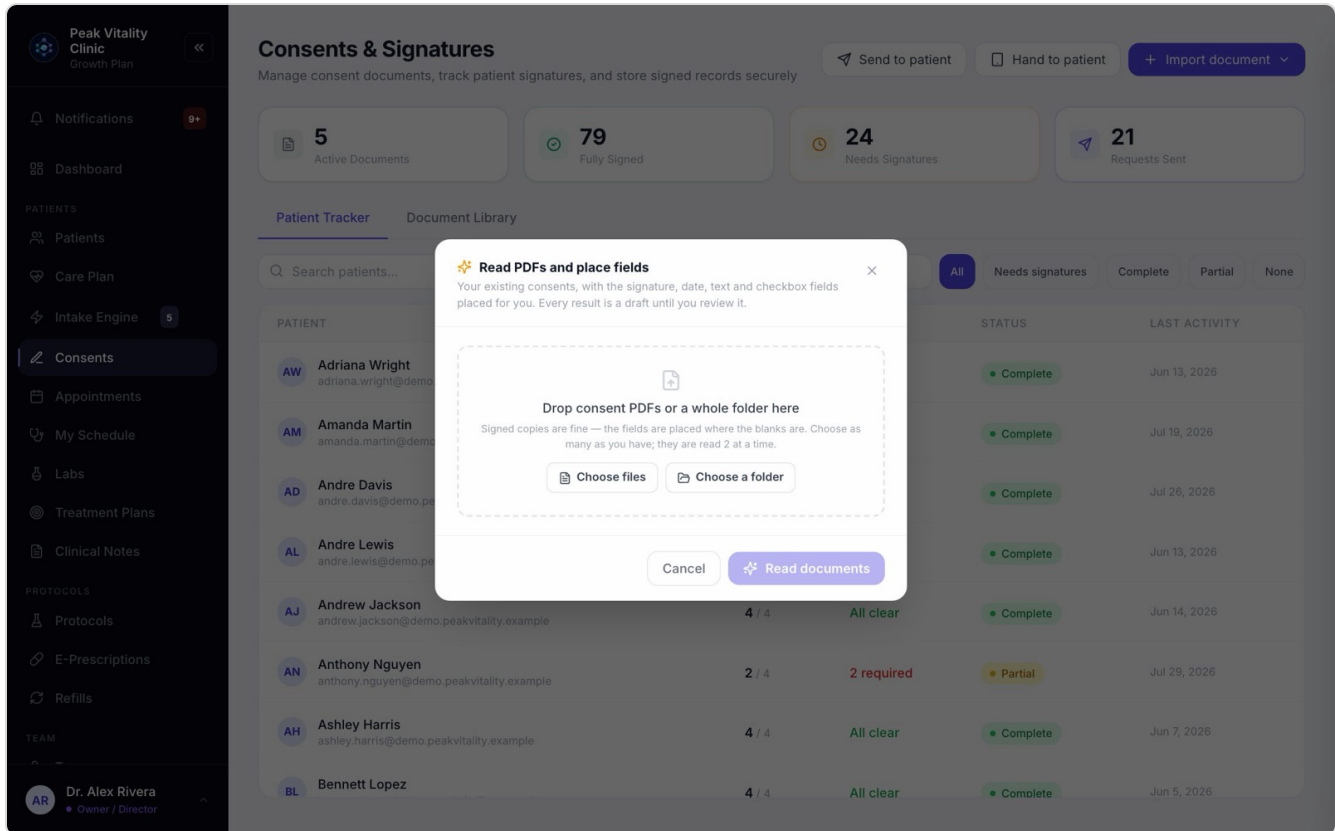
1. The document opens for step 2. First choose who you're placing for: **Patient** or **Clinic / Staff**.
2. Pick **Signature**, **Date**, **Text** or **Check**, then click the page where it goes.
3. Drag a box to move it, and its corner to resize it. Its tag says **REQ** or **OPT**. Click the tag to switch between required and optional.
4. Press **Save**. The form is ready to sign.

Tip. Boxes for the clinic are for your team to fill in after the patient signs. The patient only fills in their own.

5. MANY PDFS AT ONCE

1. Click **Import document**, then **Read PDFs and place fields**.

2. Drop in your consent PDFs, or a whole folder. Signed copies are fine.
3. Press the button that counts them, like **Read 12 documents**. Keep the window open while it works.
4. Each PDF comes back with its boxes already placed, saved switched off. Press **Review** on each one.



Read PDFs and place fields: every result is a draft until you review it.

6. CHECK THE PLACED BOXES, THEN SWITCH IT ON

1. In the library, a form that still needs checking says **Review placed fields**.
2. Open it. Check each box is on the right line and belongs to the right person. Fix any that aren't, then press **Save**.
3. Turn on the switch in the card's top corner. Now patients can be asked to sign it.

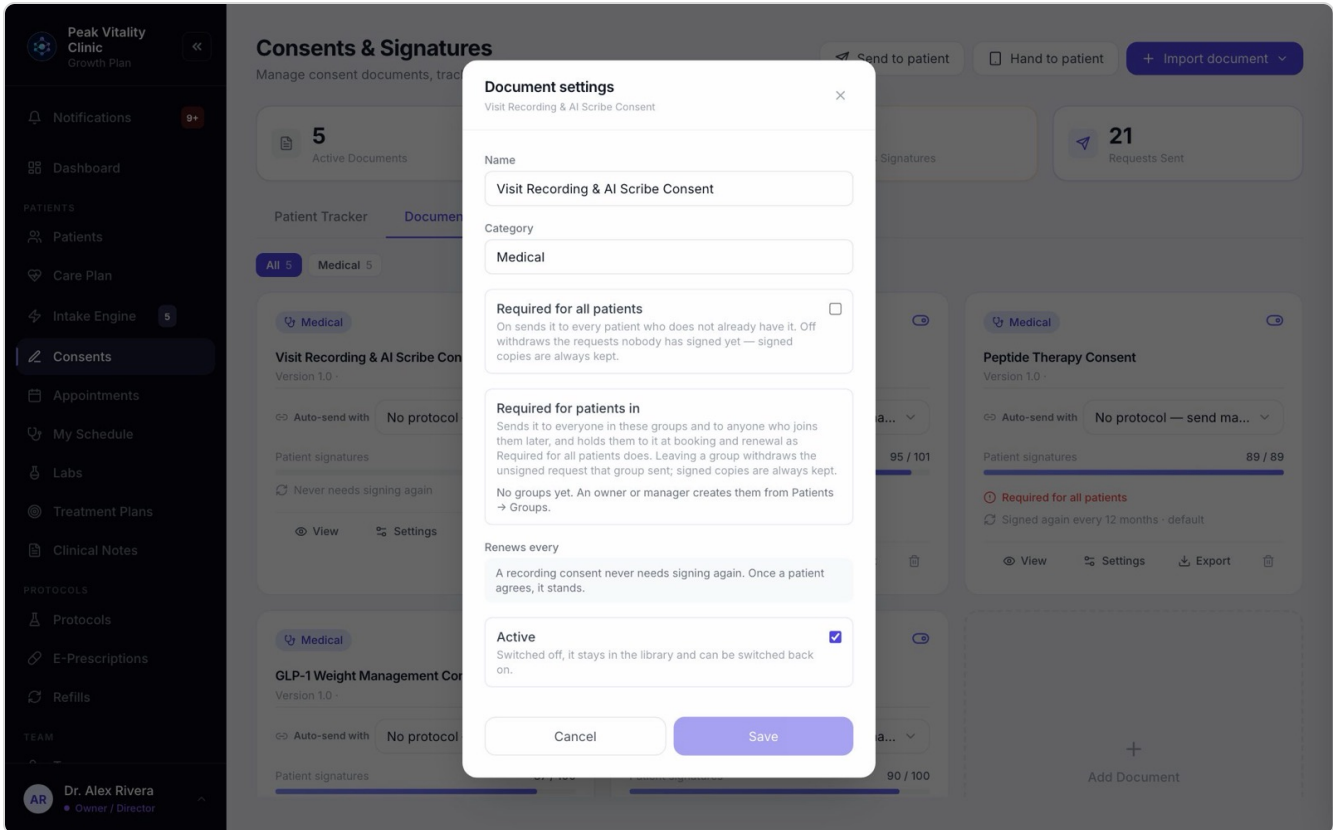
7. A PDF ALREADY IN YOUR DOCUMENTS

If the form is already saved in your clinic's Documents, choose **Import document** → **From Document Library** and pick it. It then goes through the same steps as an upload. A PDF that is already a consent says **Already a consent**, so you don't add it twice.

8. DECIDE WHO MUST SIGN IT

1. Press **Settings** on the form's card.
2. Turn on **Required for all patients** for a form everyone signs, like your privacy notice. It goes to every patient who doesn't have it yet.
3. Or tick groups under **Required for patients in**. You make groups under **Patients** → **Groups**.

4. Leave both off for a form that only goes with certain visits.



Document settings: who must sign it, and how often.

9. SET HOW OFTEN IT IS SIGNED AGAIN

1. In the same **Settings**, choose **Renews every**.
2. **Default** means required forms every 12 months, and other forms never. Or pick **Never**, **6 months**, **12 months**, **24 months**, or **Custom number of months**.
3. Press **Save**. The card now says how often it is signed again.
4. When a signature lapses, the form goes back into the patient's app to sign again, and the tracker says **Expired — re-sign**.

Tip. Making the time shorter lapses every older signature the moment you save, and those patients are asked to sign again.

10. ATTACH IT TO YOUR VISIT TYPES

1. Go to **Appointments** → **Visit types** and press **Edit** on a visit.
2. Open **Forms & consents** and click **Add a consent**.
3. Press **Save changes**. The consent goes out on its own when this visit is booked. Nobody is asked to sign one they already signed.

Peak Vitality Clinic
Growth Plan

Appointments

New patient consult
Everything about this visit lives here — booking, rooms, forms and checkout all follow it.

- Basics**
Name, category, description
- Format & length**
How long, where, who can book
- Providers**
Who sees this visit
- Rooms & timing**
Rooms, setup and cleanup
- Services & pricing**
Price, deposit, what it sells
- Forms & consents**
Sent automatically on booking
- Patient prep**
Checklist and care programs
- Review**
Everything, and any conflicts

Intake forms
Sent to the patient automatically when this visit is booked. Once means a patient who already filled it in isn't asked again.

No intake forms go out with this visit.

+ Add an intake form

Consent forms
Sent when it's booked. Nobody is asked to sign something they've already signed; a consent with a renewal window comes round again on its own.

No consents go out with this visit.

+ Add a consent

Delete Back Next Save changes

Forms & consents on a visit type. Add a consent here and it goes out when the visit is booked.

11. SEND IT WITH A PROTOCOL, IF YOU LIKE

On the form's card, **Auto-send with** links it to a protocol. Anyone enrolled in that protocol from then on gets the form. You're asked if it should also go to patients already on it.

12. SEE WHO HAS SIGNED

Open the **Patient Tracker** tab. Each patient shows what they signed and which required forms they still owe. That's it. Your consent forms are ready.

Dashboard INTS Patients Care Plan Intake Engine 5 Consents Appointments My Schedule Labs Treatment Plans Clinical Notes COLS Protocols E-Prescriptions Refills Dr. Alex Rivera Owner / Director	Patient Tracker Document Library		Q Search patients... All Needs signatures Complete Partial None				
	PATIENT	SIGNED	MISSING	STATUS	LAST ACTIVITY		
	AW Adriana Wright adriana.wright@demo.peakvitality.example	4 / 4	All clear	Complete	Jun 13, 2026		
	AM Amanda Martin amanda.martin@demo.peakvitality.example	4 / 4	All clear	Complete	Jul 19, 2026		
	AD Andre Davis andre.davis@demo.peakvitality.example	4 / 4	All clear	Complete	Jul 26, 2026		
	AL Andre Lewis andre.lewis@demo.peakvitality.example	4 / 4	All clear	Complete	Jun 13, 2026		
	AJ Andrew Jackson andrew.jackson@demo.peakvitality.example	4 / 4	All clear	Complete	Jun 14, 2026		
	AN Anthony Nguyen anthony.nguyen@demo.peakvitality.example	2 / 4	2 required	Partial	Jul 29, 2026		
	AH Ashley Harris ashley.harris@demo.peakvitality.example	4 / 4	All clear	Complete	Jun 7, 2026		
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The Patient Tracker: who has signed, and who still owes a form.