

# Consents

Your consent forms, and who has signed them. Send forms, hand the tablet over in the office, and keep your library of forms in order.

Page manual · For Owners, Managers, Front desk, Providers · [aminova.health/university/consents](https://aminova.health/university/consents)

## 1. THE PAGE AT A GLANCE

Consents is where every consent form lives, and where you see who has signed what. Across the top are the buttons to send, to sign in the office, and to bring in forms. Below them are the numbers, then two tabs: **Patient Tracker** and **Document Library**.

Only an owner or manager can change the library. Everyone else sees the same buttons, switched off, with the reason.

| PATIENT                                                              | SIGNED | MISSING    | STATUS   | LAST ACTIVITY |
|----------------------------------------------------------------------|--------|------------|----------|---------------|
| <b>AW</b> Adriana Wright<br>adriana.wright@demo.peakvitality.example | 4 / 4  | All clear  | Complete | Jun 13, 2026  |
| <b>AM</b> Amanda Martin<br>amanda.martin@demo.peakvitality.example   | 4 / 4  | All clear  | Complete | Jul 19, 2026  |
| <b>AD</b> Andre Davis<br>andre.davis@demo.peakvitality.example       | 4 / 4  | All clear  | Complete | Jul 26, 2026  |
| <b>AL</b> Andre Lewis<br>andre.lewis@demo.peakvitality.example       | 4 / 4  | All clear  | Complete | Jun 13, 2026  |
| <b>AJ</b> Andrew Jackson<br>andrew.jackson@demo.peakvitality.example | 4 / 4  | All clear  | Complete | Jun 14, 2026  |
| <b>AN</b> Anthony Nguyen<br>anthony.nguyen@demo.peakvitality.example | 2 / 4  | 2 required | Partial  | Jul 29, 2026  |
| <b>AH</b> Ashley Harris<br>ashley.harris@demo.peakvitality.example   | 4 / 4  | All clear  | Complete | Jun 7, 2026   |
| <b>BL</b> Bennett Lopez                                              | 4 / 4  | All clear  | Complete | Jun 5, 2026   |

Consents, on the Patient Tracker tab.

## 2. THE NUMBERS

1. **Active Documents** is how many forms are switched on.
2. **Fully Signed** is how many patients have signed every required form.
3. **Needs Signatures** is how many patients still owe one.

4. **Requests Sent** is how many forms are out, waiting to be signed.

**Peak Vitality Clinic**  
Growth Plan

**Consents & Signatures**  
Manage consent documents, track patient signatures, and store signed records securely

Send to patient | Hand to patient | Import document

5 Active Documents | 79 Fully Signed | 24 Needs Signatures | 21 Requests Sent

Patient Tracker | Document Library

Search patients... | All | Needs signatures | Complete | Partial | None

| PATIENT                                                              | SIGNED | MISSING   | STATUS   | LAST ACTIVITY |
|----------------------------------------------------------------------|--------|-----------|----------|---------------|
| <b>AW</b> Adriana Wright<br>adriana.wright@demo.peakvitality.example | 4 / 4  | All clear | Complete | Jun 13, 2026  |
| <b>AM</b> Amanda Martin<br>amanda.martin@demo.peakvitality.example   | 4 / 4  | All clear | Complete | Jul 19, 2026  |
| <b>AD</b> Anna Davis                                                 |        |           |          |               |

The four numbers, always at the top.

### 3. NEWLY SIGNED

When someone signs, a **Newly signed** box shows above the numbers for seven days. Click a name to open that patient. When nothing is new, the box is hidden.

### 4. SEND FORMS TO A PATIENT

1. Click **Send to patient** and pick the patient.
2. Tick the forms. The **Consents** and **Intake forms** tabs share one list, so you can send both kinds at once.
3. A form they already signed says **Already signed**, and one waiting with them says **Already sent**. Neither goes again.
4. Press **Send**. They get one email with a link, and the forms wait in their patient app.

store signed records securely

Send to patient Hand to patient + Import document ▾

signed

24 Needs Signatures

21 Requests Sent

All Needs signatures Complete Partial None

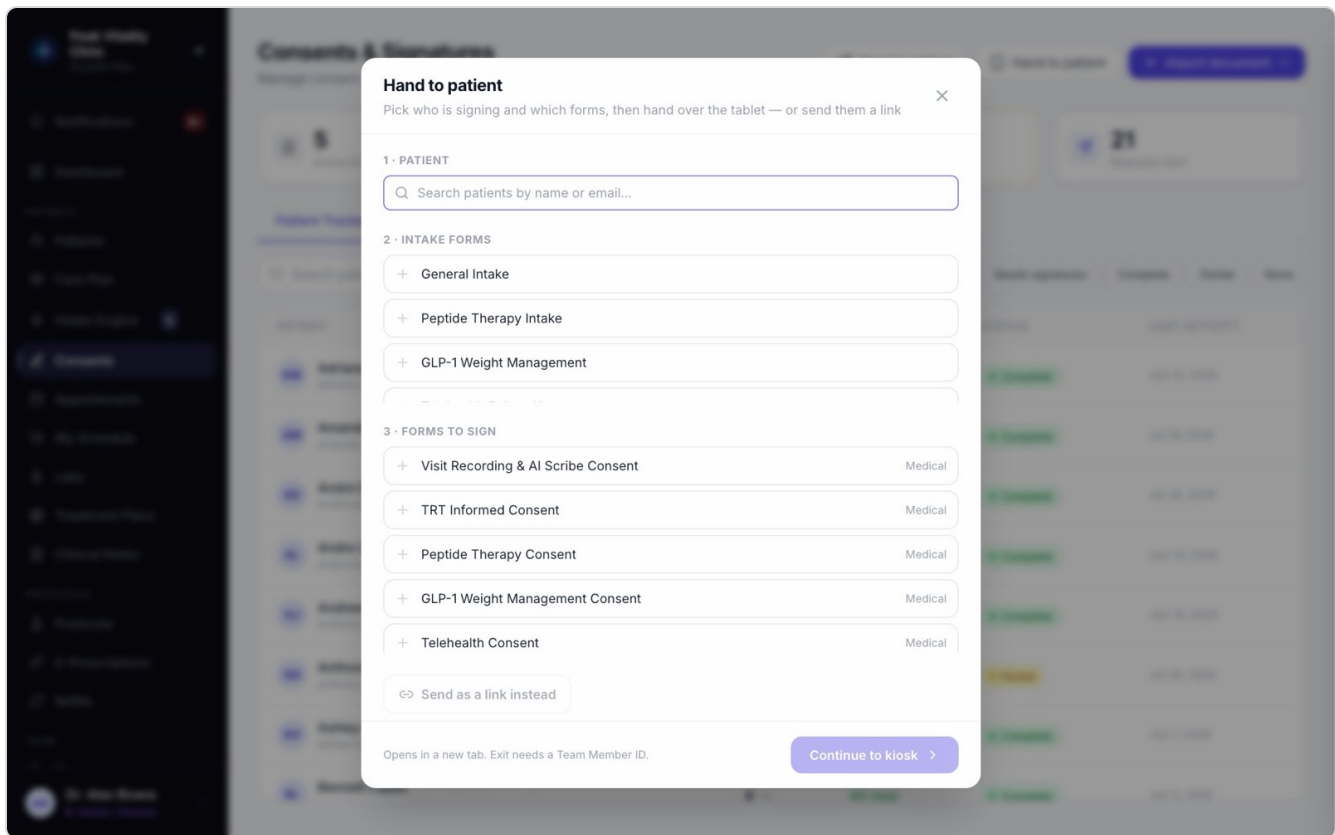
| SIGNED | MISSING   | STATUS     | LAST ACTIVITY |
|--------|-----------|------------|---------------|
| 4 / 4  | All clear | • Complete | Jun 13, 2026  |
| 4 / 4  | All clear | • Complete | Jul 19, 2026  |

Send to patient sends one person the forms you pick.

**Tip.** Visit types send their own forms when a visit is booked. Use this for the one-off.

## 5. SIGN IN THE OFFICE

1. Click **Hand to patient**.
2. Pick the patient. Then add forms under **2 • Intake forms** and **3 • Forms to sign**, in the order you want them. Use the arrows to reorder.
3. Press **Continue to kiosk**. It opens in a new tab and shows only those forms.
4. Hand over the tablet. To leave the tablet screen, staff enter their **Team Member ID**.



Hand to patient: who is signing, which forms, and in what order.

## 6. OR SEND THE SAME FORMS AS A LINK

For someone who isn't in the building, press **Send as a link instead** in the same window. Copy the link and send it to them.

The link works once, and stops working after a while. It opens only those forms. It is shown one time, so copy it before you close the window.

## 7. BRING IN YOUR FORMS

1. Click **Import document**.
2. **Upload a PDF** brings in one form from your computer.
3. **From Document Library** uses a PDF already saved in your clinic.
4. **Read PDFs and place fields** takes many PDFs at once and places the signature, date, text and check boxes for you to review.

Hand to patient

+ Import document ^

Upload a PDF

From this computer

From Document Library

A file already in this clinic

Read PDFs and place fields

Fields placed for you to review

All

Needs signatures

Complete

Partial

None

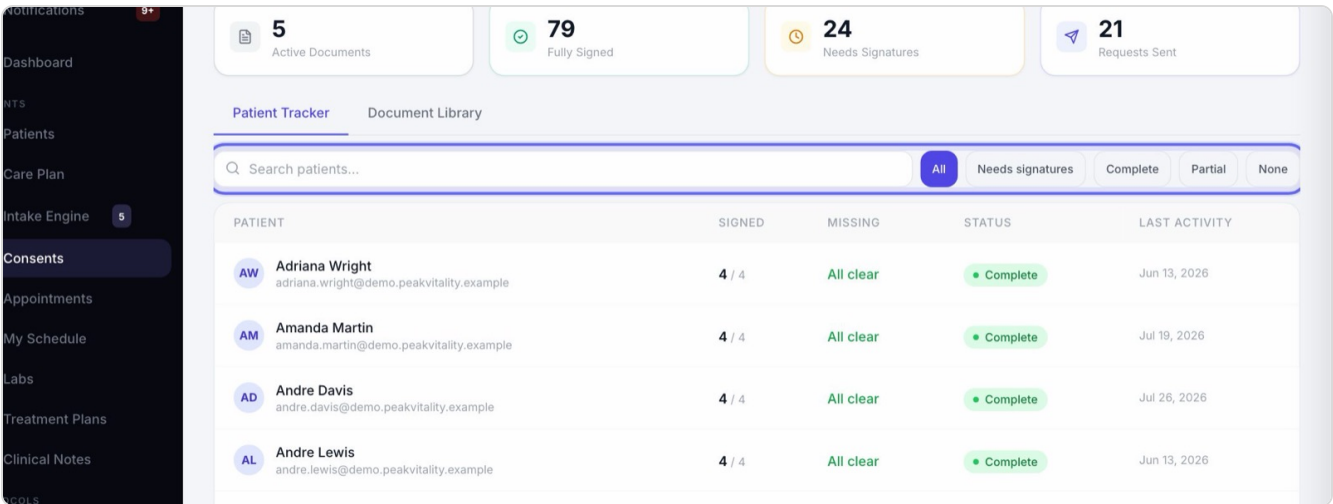
| STATUS              | LAST ACTIVITY |
|---------------------|---------------|
| <div>Complete</div> | Jun 13, 2026  |
| <div>Complete</div> | Jul 19, 2026  |

Import document: three ways to bring in a form.

**Tip.** The consent forms setup guide walks through each one.

## 8. FIND A PATIENT

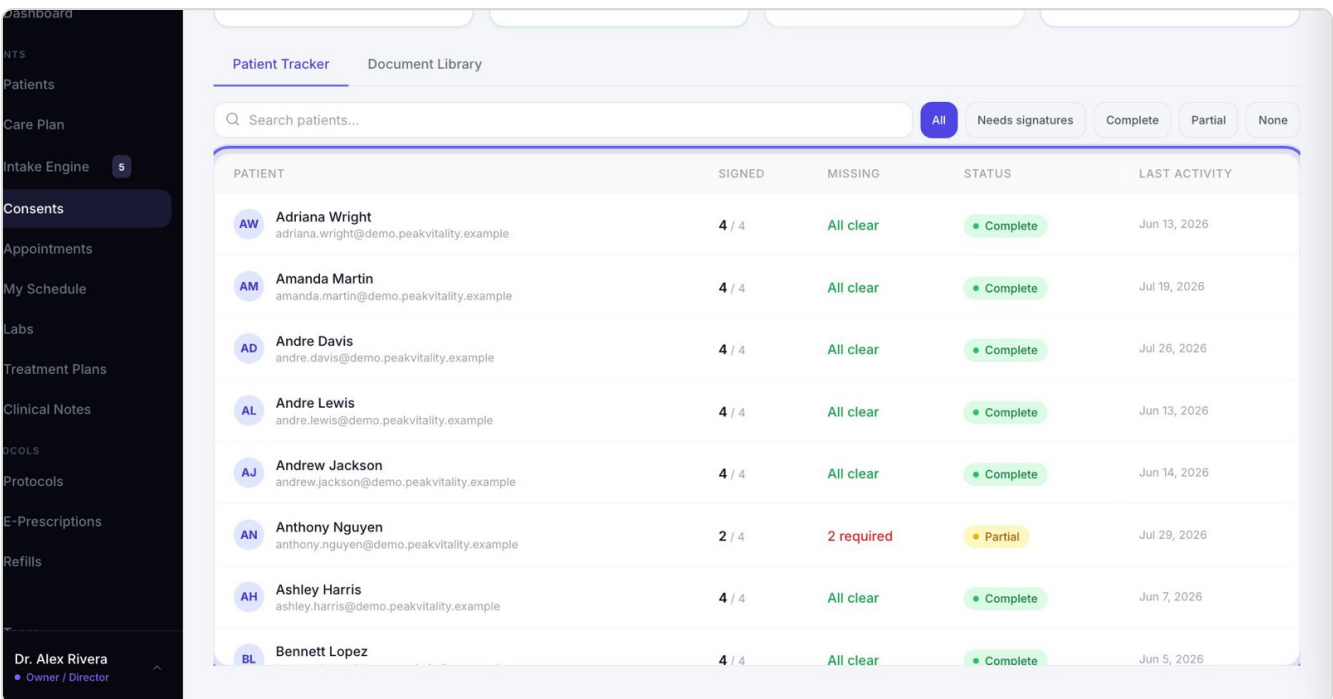
1. Type a name or email in **Search patients....**
2. Filter to **Complete**, **Partial** or **None** to see who has signed everything, some, or nothing.



Search, and filter by how much each patient has signed.

## 9. THE PATIENT TRACKER

One row per patient. **Signed** is how many forms they signed. **Missing** counts the required forms they still owe, or says **All clear**. **Status** is **Complete**, **Partial** or **Not Started**, and **Last Activity** is when they last signed.



Each patient, with what they signed and what they still owe.

## 10. ONE PATIENT'S FORMS

1. Click a patient. A panel opens with every active form and where it stands: **Signed**, **Sent**, **Pending** or **Expired**.

2. A form that renews shows when it **Renews**, or **Expired** — **re-sign** once it has lapsed.
3. Click the eye to open a form. A signed one opens the signed copy.
4. **Send All Pending for Signature** sends every form they haven't signed, in one email.

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**Adriana Wright**  
adriana.wright@demo.peakvitality.example

**CONSENT DOCUMENTS**

- Visit Recording & A...  
Pending | Sign now
- TRT Informed Consent  
Signed Jun 8, 2026 | Required | Renews Jun 8, 2027  
Needs a second signature? Request from...
- Peptide Therapy Consent  
Signed Mar 30, 2026 | Required | Renews Mar 30, 2027  
Needs a second signature? Request from...
- GLP-1 Weight Management Cons...

Send All Pending for Signature

One patient, opened: each form, its status, and when it renews.

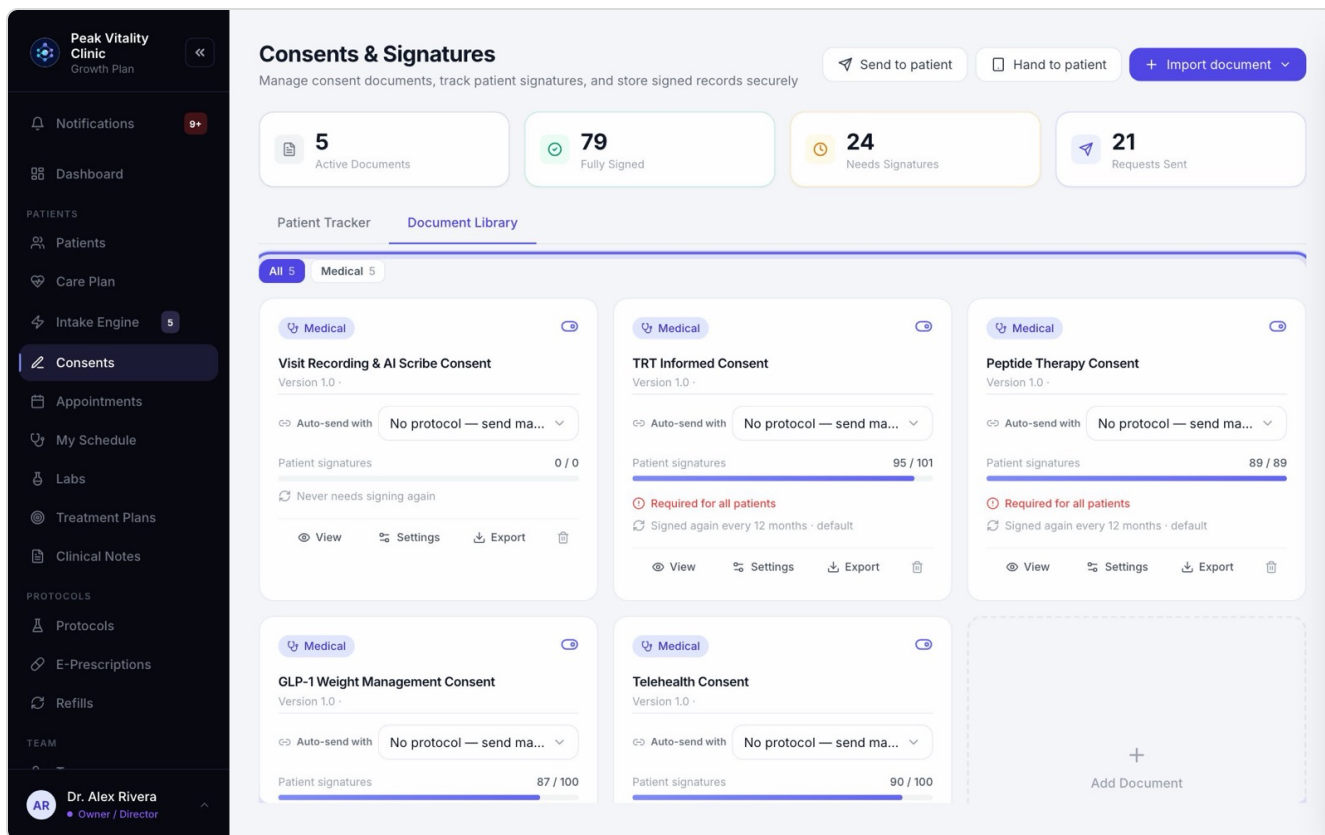
## 11. WHEN THE CLINIC SIGNS TOO

1. Some forms have boxes for the clinic to fill in. Once the patient signs, the form says **Awaiting your signature** until you do.
2. Press **Sign clinic fields** on a PDF form, or **Sign for the clinic** on a form written in the app, and sign.
3. Need a second clinician to review it? Under **Needs a second signature?**, choose **Request from...** and pick them. They press **Co-sign now**.

## 12. THE DOCUMENT LIBRARY

Every consent form you use, as a card. Each card shows its category, whether it is switched on, how many patients have signed it, and how often it is signed again.

Click a category at the top to see only those forms. **All** shows every one.



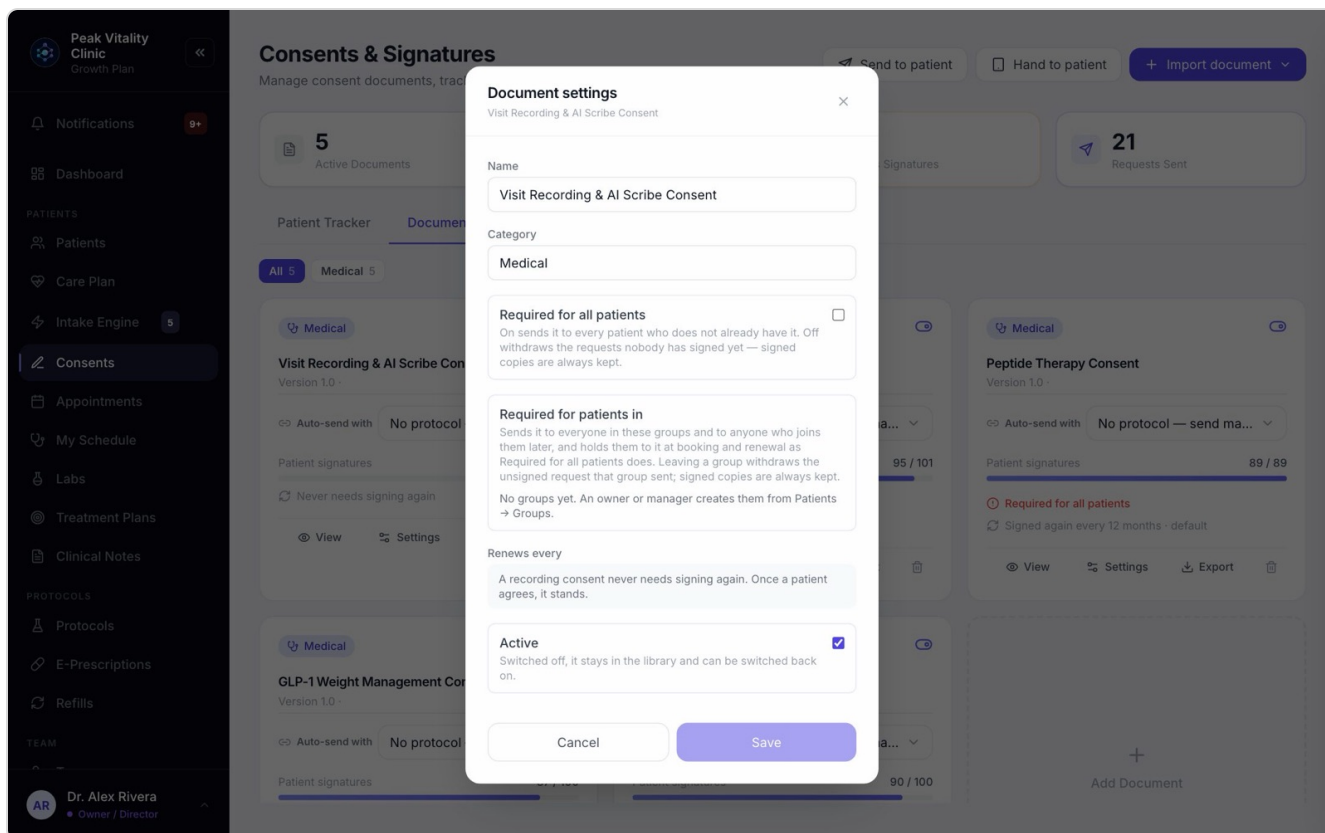
Document Library: every form, with its signing progress.

### 13. WHAT EACH CARD DOES

1. The switch in the corner turns the form on or off. A form that is off stays in the library.
2. **Place fields** puts signature and date boxes on a PDF. Once placed, it says **Edit fields**. Fields placed for you say **Review placed fields** until someone checks them.
3. **Settings** changes the name, category, who must sign it, and how often.
4. **Export** opens the PDF, or downloads the wording of a form written in the app.
5. **Auto-send with** links a form to a protocol, so anyone enrolled in it gets the form.

### 14. DOCUMENT SETTINGS

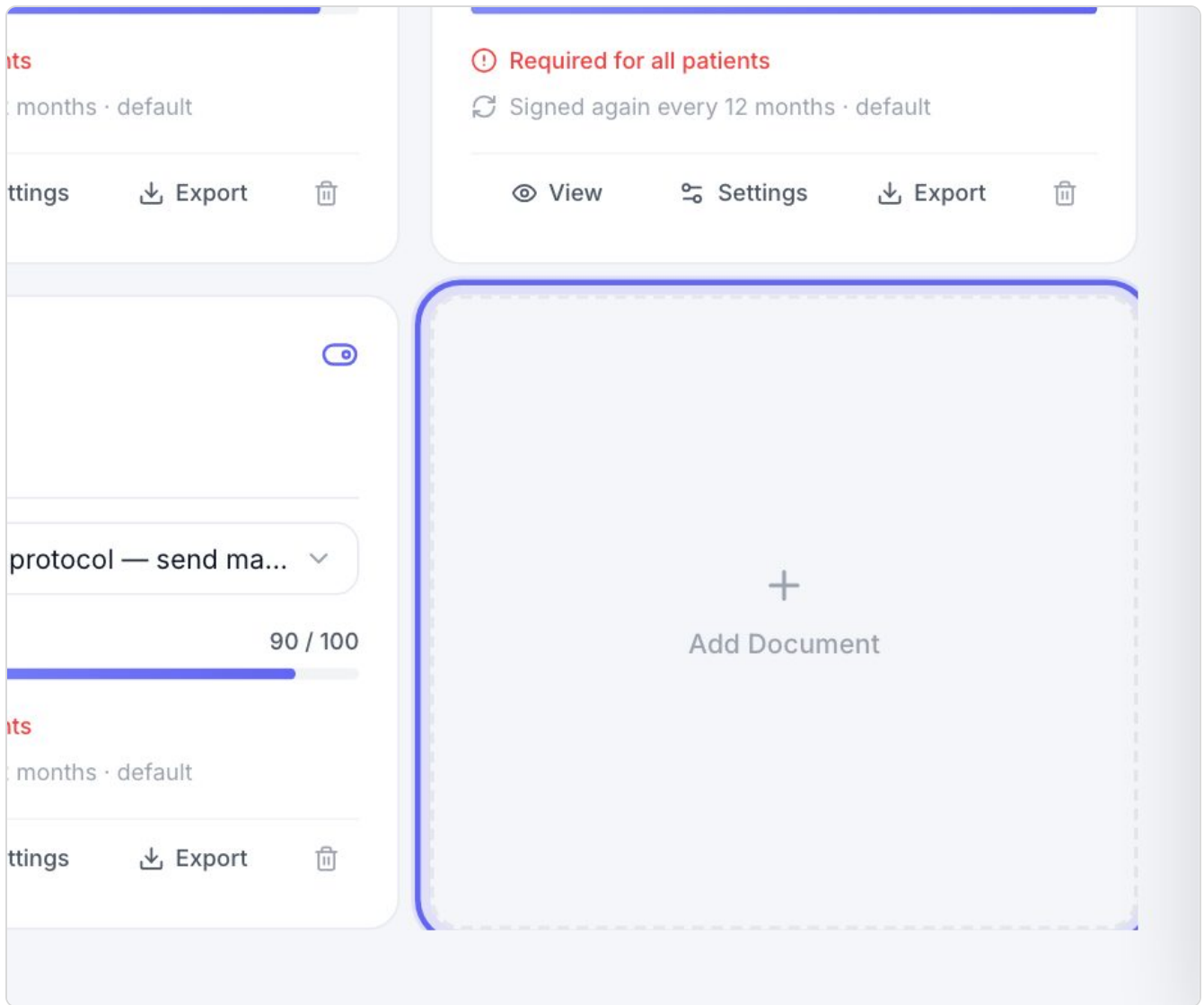
1. Change the **Name** and **Category**. You can type a category of your own.
2. **Required for all patients** sends it to everyone who doesn't have it yet. Turning it off takes back the requests nobody has signed. Signed copies are always kept.
3. **Required for patients in** does the same for the patient groups you tick.
4. **Renews every** sets how often patients sign it again.
5. Press **Save**.



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

## 15. ADD ONE MORE FORM

The **Add Document** card at the end of the library uploads one more consent form as a PDF, the same way as **Upload a PDF**.



Add Document, at the end of the library.