

Dashboard

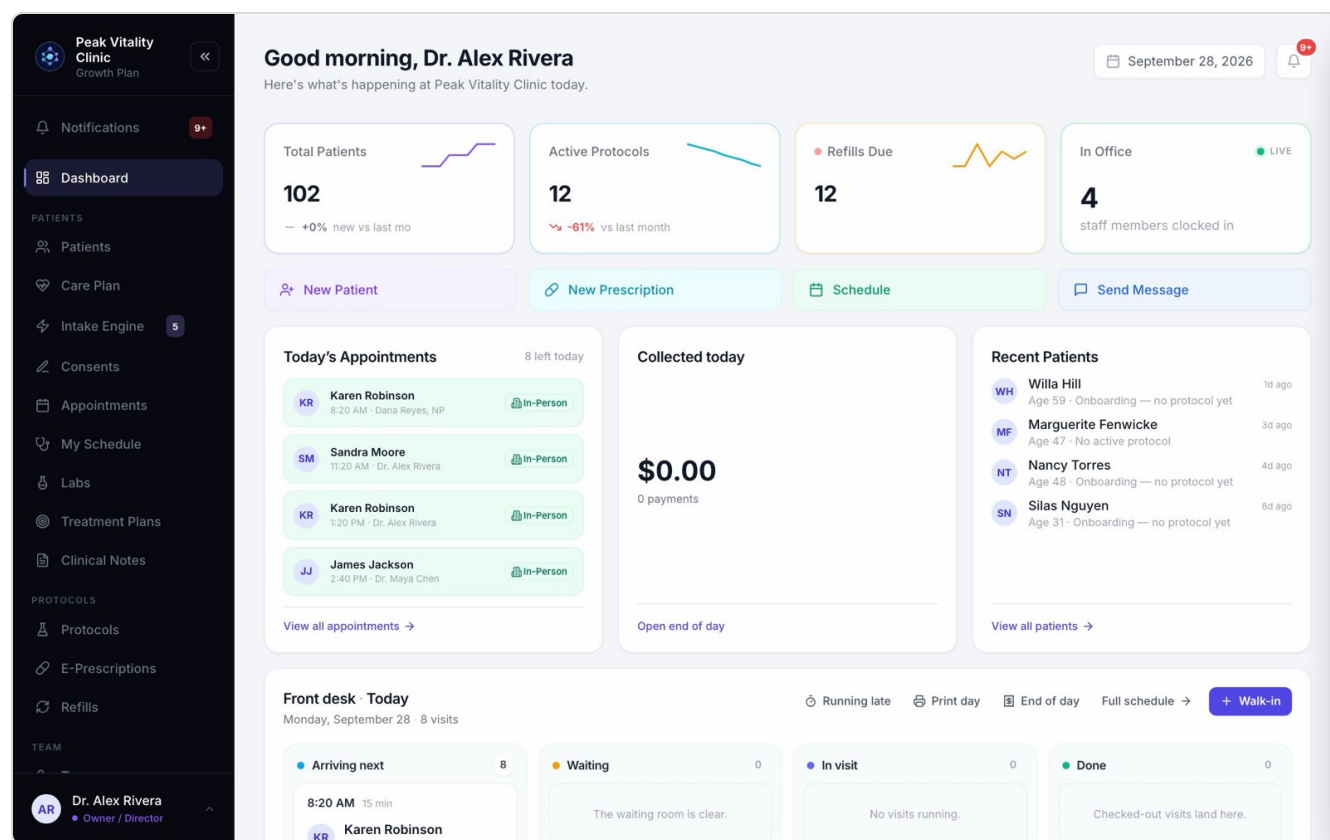
Your clinic at a glance. Today's numbers, who is coming in, the money taken, work that needs a person, and the bell where anything new for you lands.

Page manual · For Everyone on your team · aminova.health/university/dashboard

1. THE PAGE AT A GLANCE

The Dashboard is the first page you see each day. At the top are a greeting, today's date and your notifications bell. Below them are today's numbers, quick actions, today's visits, the front desk, the work queue and the week's activity.

What you see depends on your role. A tile you can't use is left off, not shown empty.



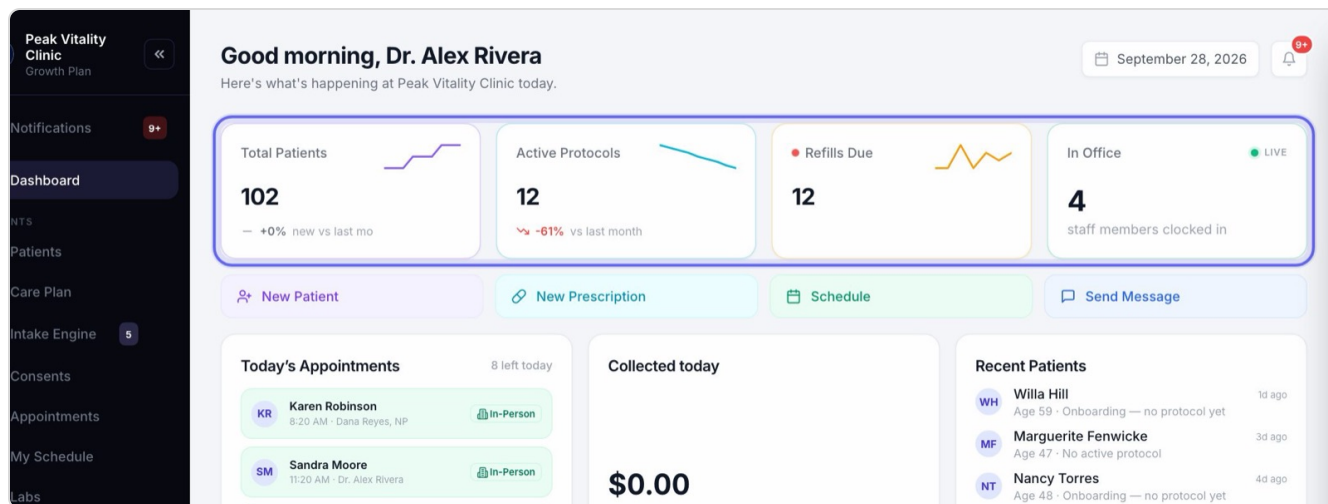
The Dashboard, as an owner sees it.

2. TODAY'S NUMBERS

1. **Total Patients** is everyone in your clinic. The small number beside it compares new patients this month with last month.
2. **Active Protocols** is how many protocols patients are on right now.
3. **Refills Due** counts refills that are due plus refills patients asked for.

4. **In Office** shows how many staff are clocked in right now.

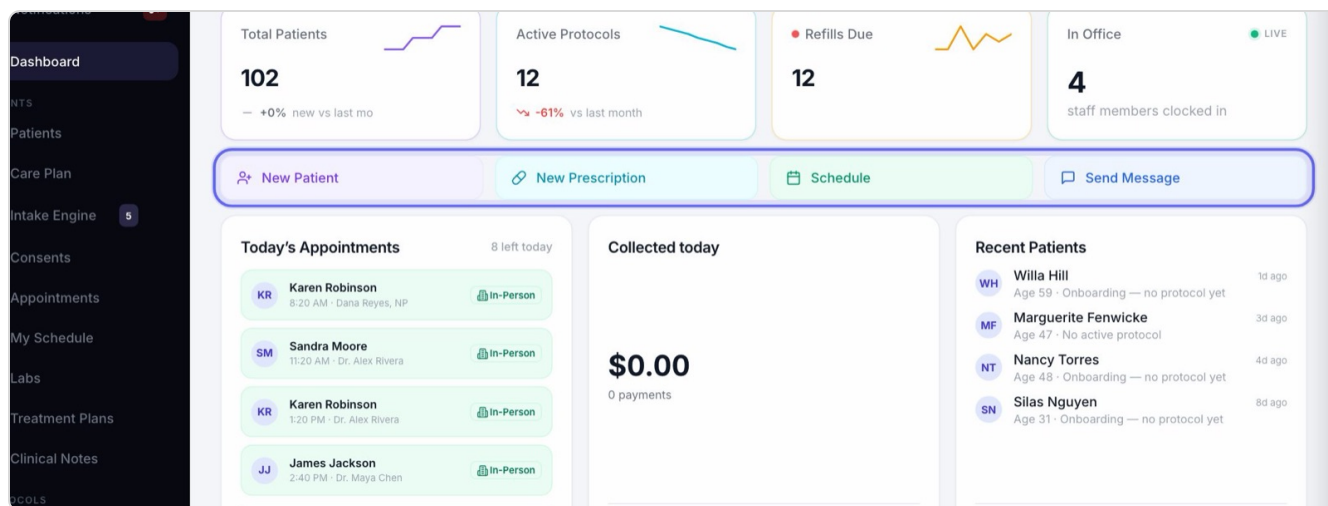
5. Click a number to open the list behind it. The front desk sees **Appts Today** and **Check-ins Today** instead of the first two.



The four numbers across the top of the page.

3. QUICK ACTIONS

1. **New Patient** opens the form to add a patient.
2. **Schedule** books a visit, and **Send Message** writes to a patient.
3. Prescribers also see **New Prescription** when your plan includes e-prescribing.
4. People who take payments but don't prescribe see **Take Payment** in that spot instead.

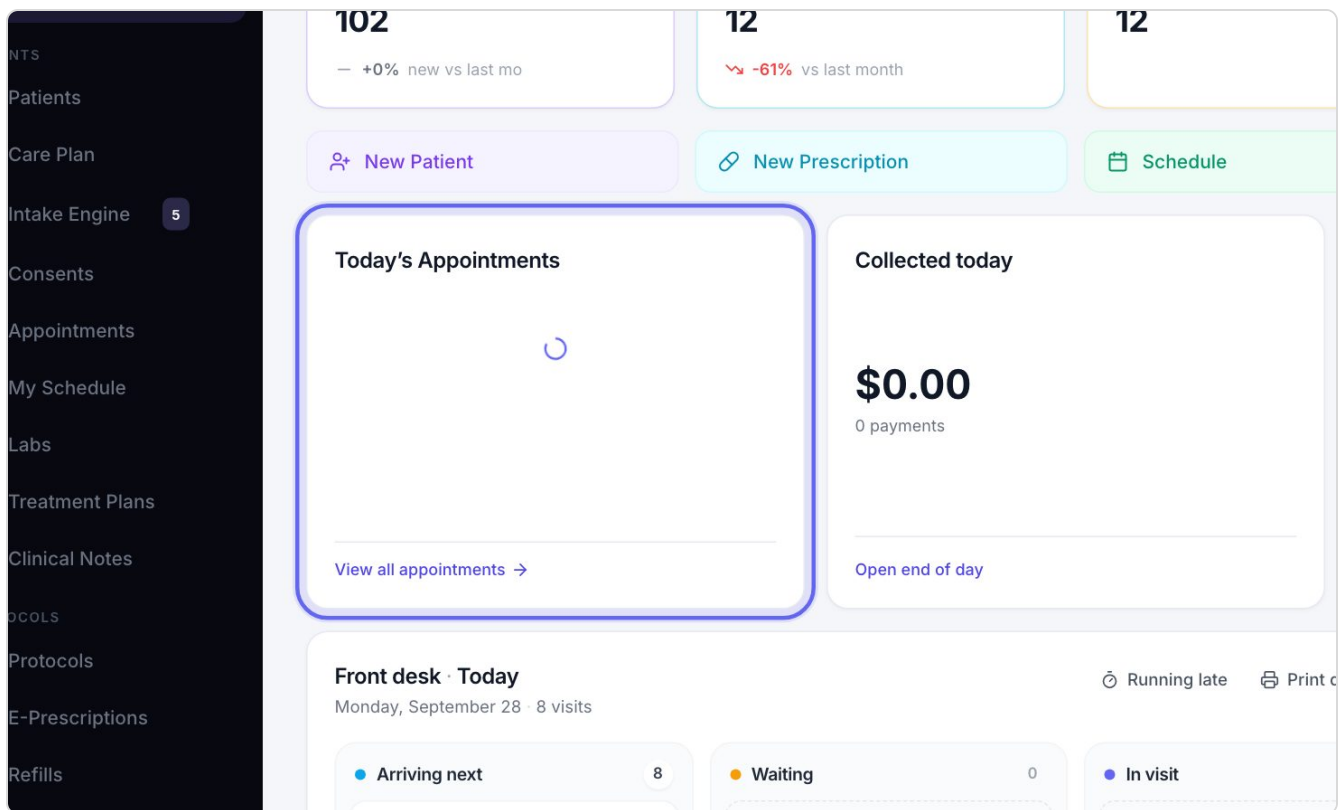


The things you do most, one click away.

4. TODAY'S APPOINTMENTS

This tile lists the next visits still to come today, up to four, with how many are left. A visit leaves the list once it's over.

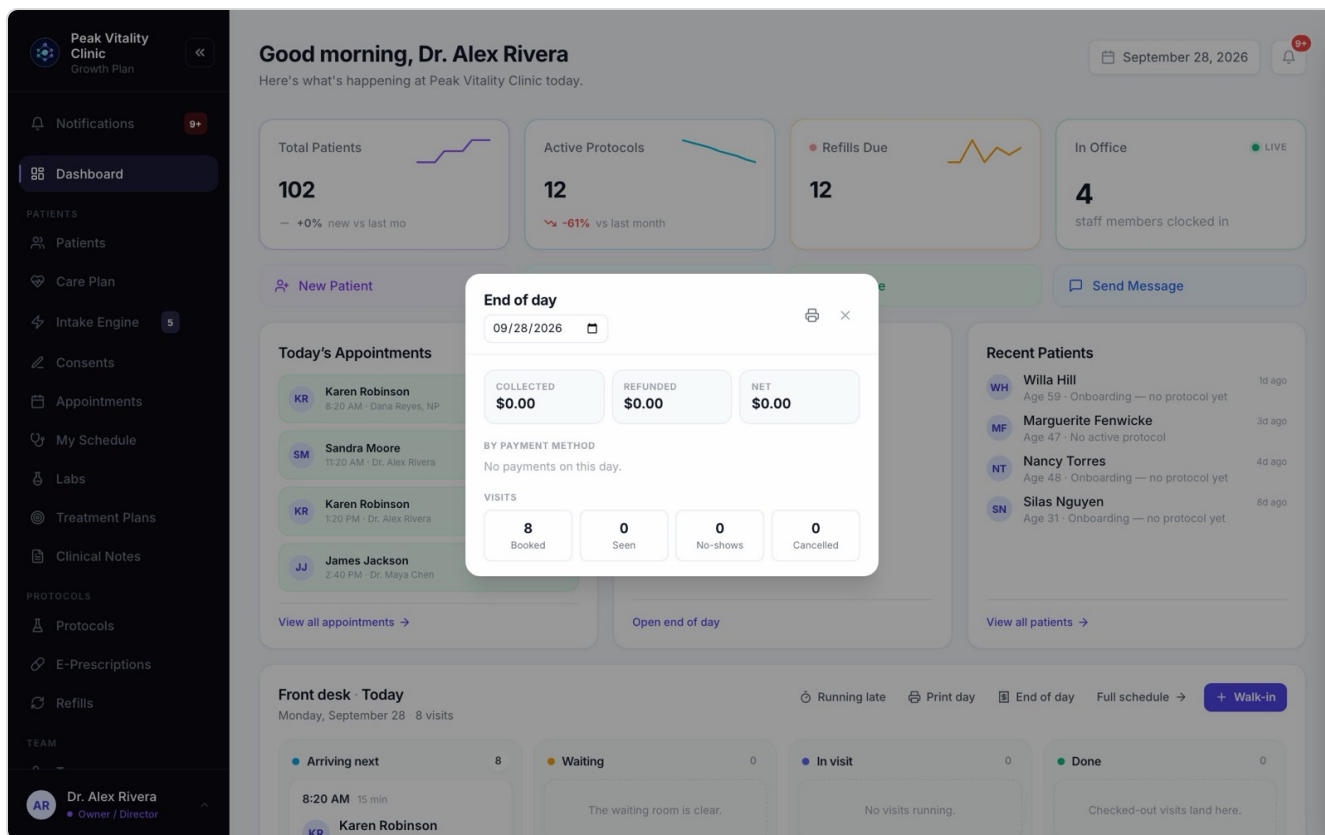
Click a visit to open it and check the patient in, start, check out or charge. A video visit has a **Join** button. **View all appointments** opens the full schedule.



The visits still to come today.

5. COLLECTED TODAY

1. The big number is the money taken today, after refunds, with how many payments made it up.
2. Press **Open end of day** for the breakdown: collected, refunded and net, by payment method, then the day's visits booked, seen, no-shows and canceled.
3. Pick another date at the top to see a different day. The printer icon prints it.
4. Only people who can see revenue get this tile.



End of day: the day's money by payment method, and its visits.

6. RECENT PATIENTS

The four patients added most recently, with when they joined. A cake icon means it's their birthday today.

Click a name to open their chart, or **View all patients** for the full list.

12

4
staff members clocked in

Schedule

Send Message

Recent Patients

WH

Willa Hill

Age 59 · Onboarding — no protocol yet

1d ago

MF

Marguerite Fenwicke

Age 47 · No active protocol

3d ago

NT

Nancy Torres

Age 48 · Onboarding — no protocol yet

4d ago

SN

Silas Nguyen

Age 31 · Onboarding — no protocol yet

8d ago

View all patients →

Running late

Print day

End of day

Full schedule →

+ Walk-in

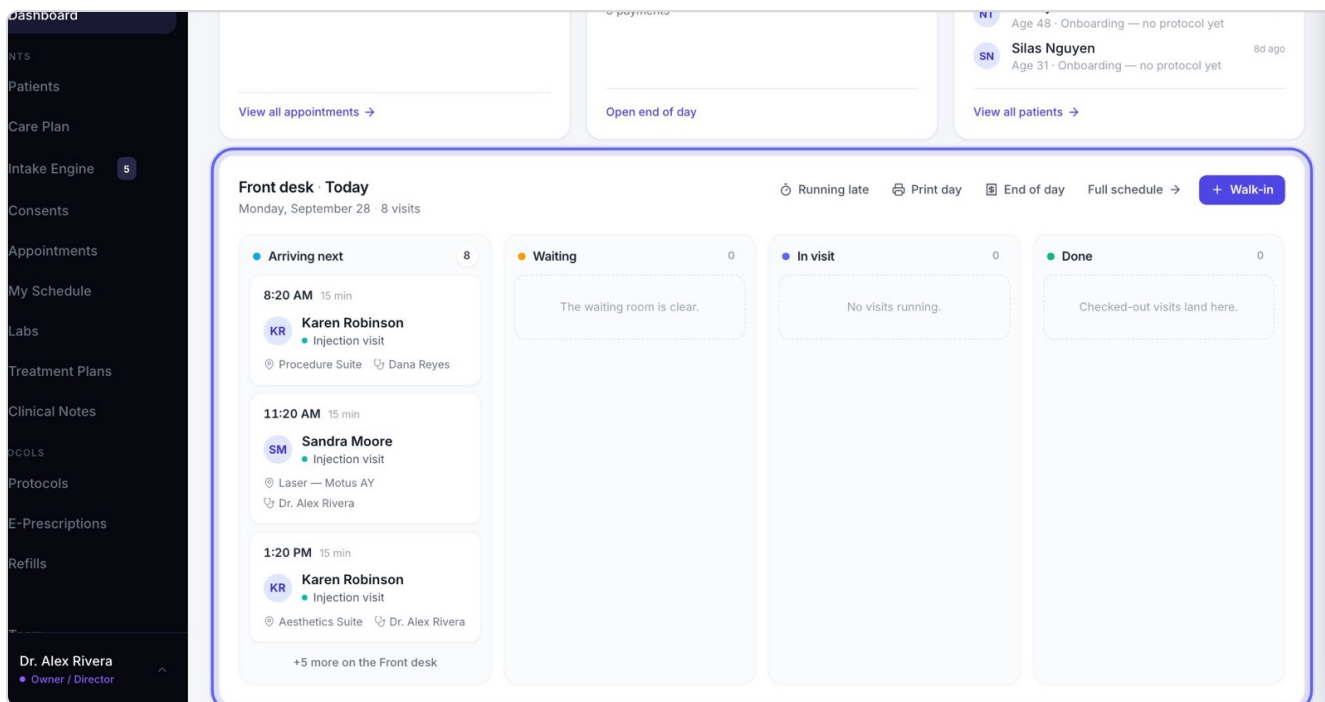
In visit 0

Done 0

The newest patients. Click a name to open the chart.

7. FRONT DESK · TODAY

1. Today's visits sit in four lanes: **Arriving next**, **Waiting**, **In visit** and **Done**.
2. Click a patient to open their visit and move it along: check in, start, check out or charge.
3. You can also drag a card into the next lane.
4. If visits were left open, an amber note lists them. Check out who was seen, and mark who didn't come.
5. Each lane shows three people. When there are more, the link under the lane opens the rest on Appointments.



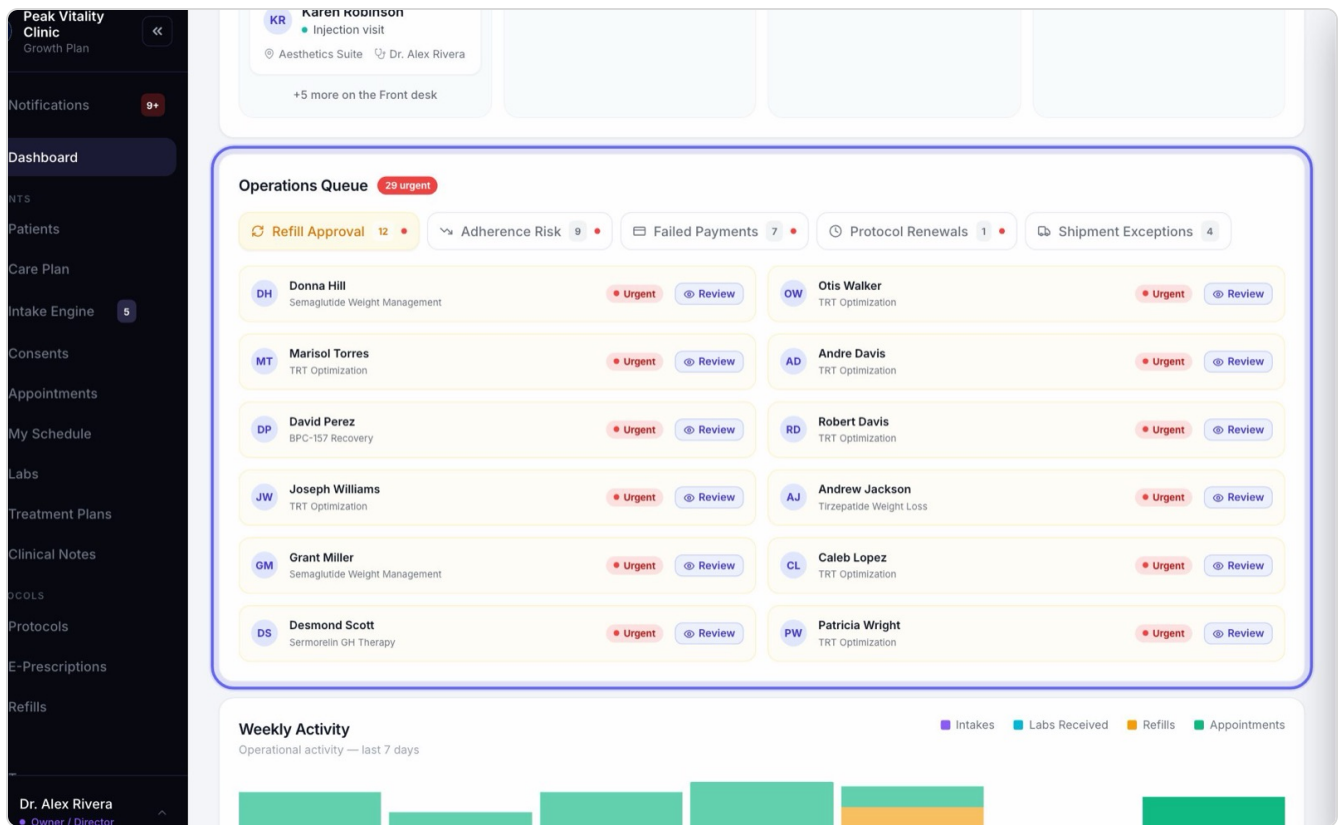
The day, lane by lane. Click a patient to open the visit.

8. FRONT DESK BUTTONS

1. **Walk-in** books someone who just came in.
2. **Running late** tells patients a provider is behind. Pick **Who** and **About how late**, then press **Tell their patients**. Everyone booked with them in the next three hours, and anyone already waiting, gets a note in their app.
3. **Print day** opens the day sheet: every visit today, by provider, ready to print.
4. **End of day** opens the day's money, for people who can see revenue. **Full schedule** opens Appointments.

9. OPERATIONS QUEUE

1. Each tab is a to-do list: **Refill Approval**, **Adherence Risk**, **Failed Payments**, **Protocol Renewals** and **Shipment Exceptions**. You only see the tabs your role is allowed to see.
2. The number on a tab is how many are waiting. A red dot means some are urgent.
3. On a refill, people who approve refills see **Review**, which opens it. Others see **Send to Dr.**, which passes it to a provider, or **View**.
4. **Remind** sends a patient who is falling behind a check-in note in their app.
5. **Retry** asks the patient, in their app, to update their card. It does not charge the card again. **Msg** opens Messages.
6. **Schedule** asks the patient, in their app, to set up a visit about renewing their protocol. **View** opens a shipment, with **Contact Carrier** and **Notify Patient**.



Work that needs a person, one tab per kind.

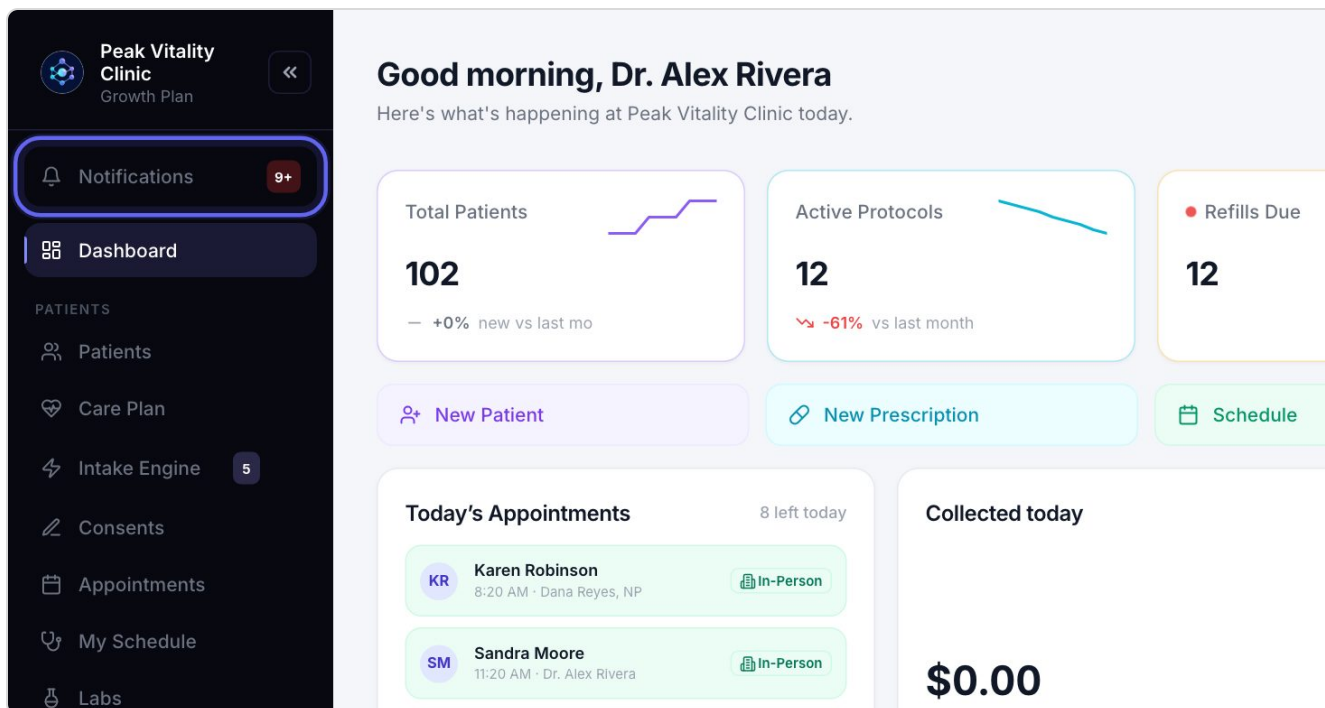
10. WEEKLY ACTIVITY

A bar for each of the last seven days, split into intakes, labs received, refills and appointments. Today's bar is brightest, and the row under the chart gives today's totals.

11. THE NOTIFICATIONS BELL

The bell sits beside the date on the Dashboard. It also sits at the top of the sidebar, so you can reach it from any page.

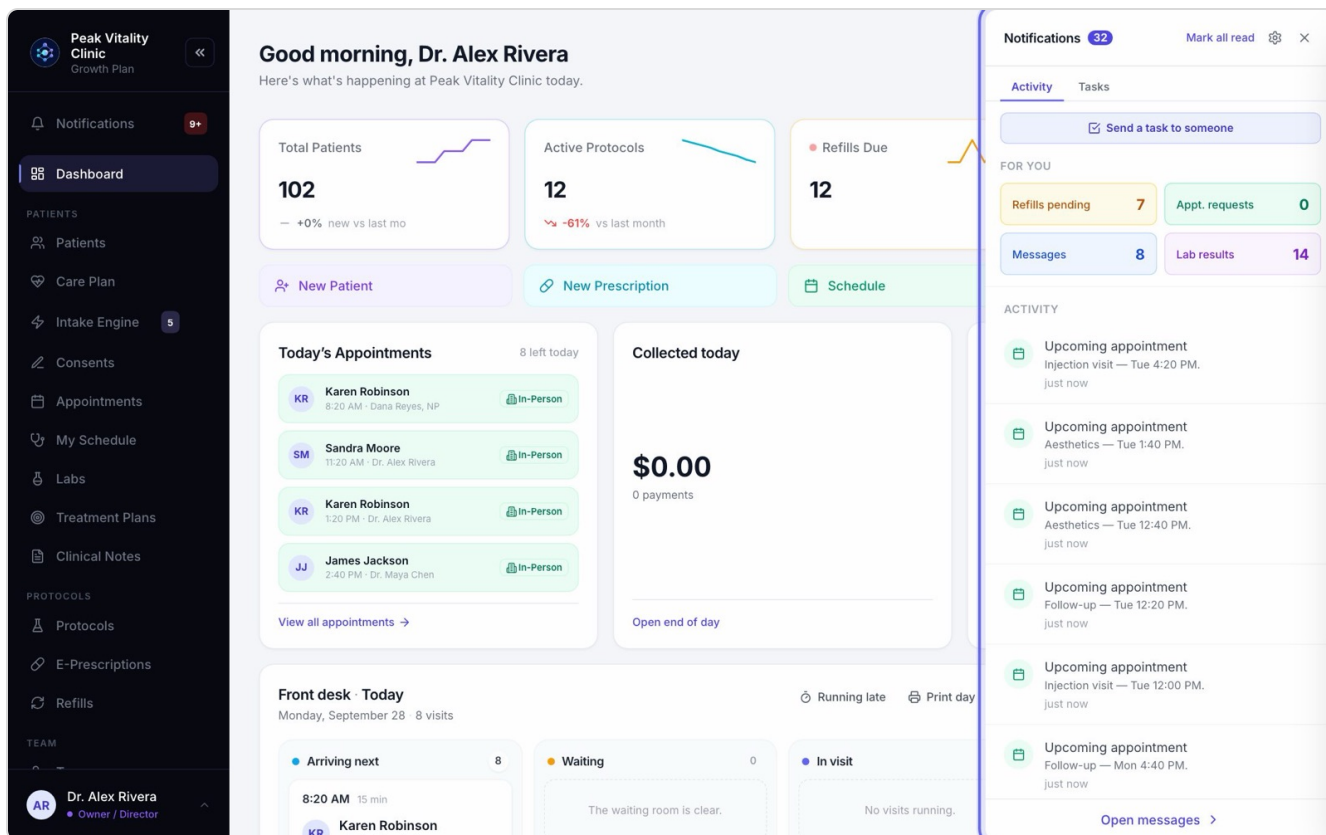
A red number on it counts what you haven't read yet. Click it to open your notifications.



The bell. The red number is what you haven't read.

12. YOUR NOTIFICATIONS

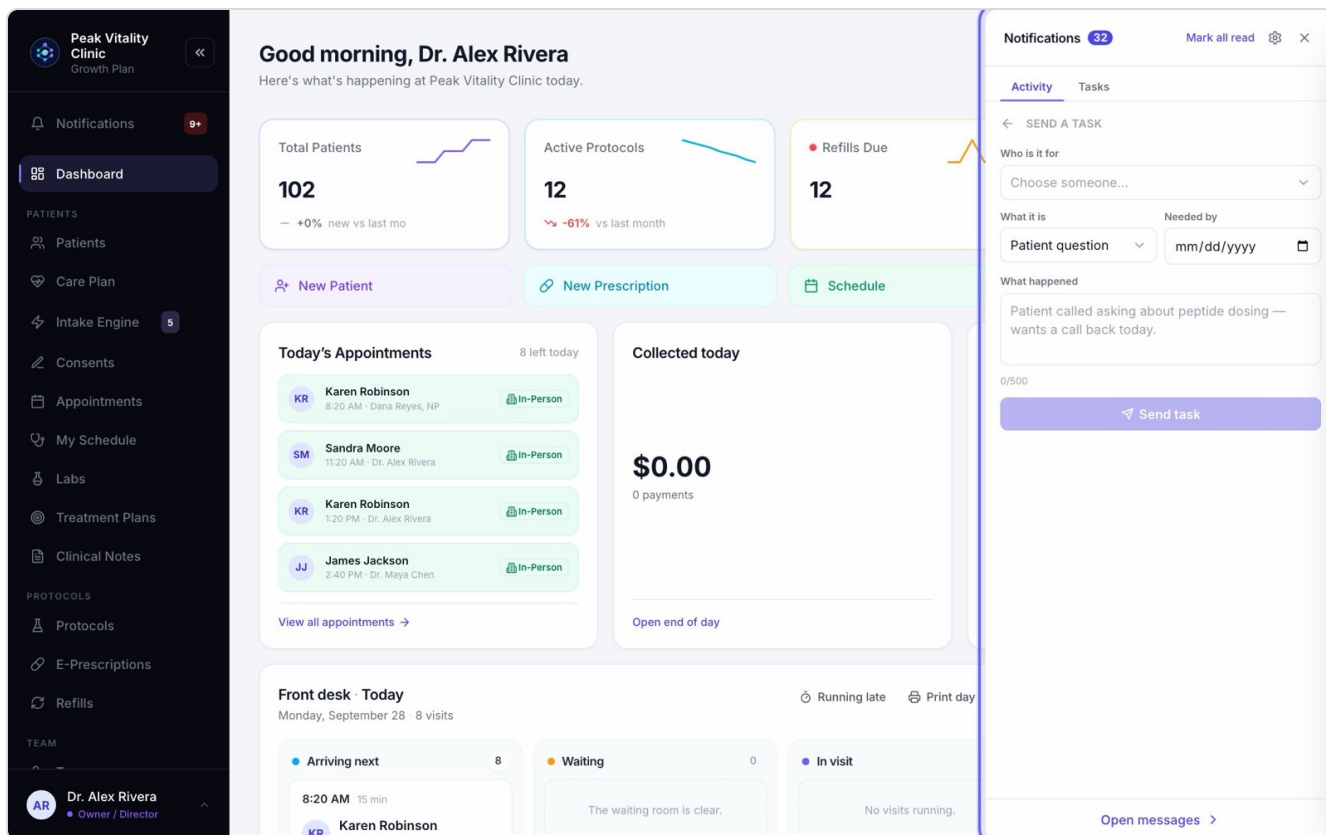
1. **For you** at the top shows counts that matter to your role. Click one to go straight to that list.
2. Under **Activity** is everything new: messages, visits, results, signed consents, tasks and more. A blue dot means unread. A red dot means urgent.
3. Click a notification to go straight to it.
4. **Mark all read** clears the count. **View all activity** shows more than the first eight.
5. **Aminova Updates** lists recent changes to Aminova. **Open messages** at the bottom goes to Messages.



The notifications panel, on the Activity tab.

13. SEND A TASK, AND SEE YOURS

1. Press **Send a task to someone**. Choose **Who is it for**, **What it is** and, if you like, **Needed by**.
2. Write **What happened**, then press **Send task**. They see it in their notifications and their Tasks.
3. The **Tasks** tab lists **Assigned to me**, **Unassigned** and **Sent by me**.
4. Tick the circle when a task is done. You can star one too. A task about a patient has an **Open chart** link.
5. Tick **Email me when a task is assigned to me** to get an email too. It never includes patient details.



Send a task: who it's for, what it is, and what happened.

14. CHOOSE WHAT YOU'RE TOLD

1. Click the gear at the top of the panel.
2. Turn on **Alert me on this device** to get alerts on this computer. Do it again on each computer you use.
3. Under **Quick tiles**, switch off the **For you** tiles you don't need.
4. Under **Mute notification types**, switch off the kinds you don't want to see, like Refills or System.

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

Good morning, Dr. Alex Rivera

Here's what's happening at Peak Vitality Clinic today.

Total Patients

102

+0% new vs last mo

Active Protocols

12

-61% vs last month

Refills Due

12

New Patient

New Prescription

Schedule

Today's Appointments 8 left today

Karen Robinson 8:20 AM · Dana Reyes, NP In-Person

Sandra Moore 11:20 AM · Dr. Alex Rivera In-Person

Karen Robinson 1:20 PM · Dr. Alex Rivera In-Person

James Jackson 2:40 PM · Dr. Maya Chen In-Person

View all appointments →

Collected today

\$0.00

0 payments

Open end of day

Front desk · Today

Monday, September 28 · 8 visits

Arriving next 8

8:20 AM 15 min

Karen Robinson

Waiting 0

The waiting room is clear.

In visit

No visits running.

Running late Print day

Notifications 32 Mark all read

Activity Tasks

THIS DEVICE

Alert me on this device

Your browser is blocking notifications for this site. Turn them back on in the padlock menu beside the address bar.

QUICK TILES

Refills pending

Appt. requests

Messages

Lab results

MUTE NOTIFICATION TYPES

Messages

My appointments

Prescriptions

Lab results

Refills

FOR YOU

Refills pending 7

Appt. requests 0

Messages 8

Lab results 14

ACTIVITY

Upcoming appointment

Injection visit — Tue 4:20 PM.

Just now

Open messages >

Notification settings: alerts on this device, tiles and muted types.