

Bring your patients over from your old system

Move your patients, charts, documents and forms into Aminova. Upload the files, check what was found, approve it, then look around before you make it final.

Setup guide · For Owners, Managers · aminova.health/university/import-patients

1. HOW AN IMPORT WORKS

You upload the files your old system gave you. Aminova reads them, works out who each record belongs to, and shows you what it found. Nothing goes into your clinic until you approve it, and nothing reaches your patients until you say so.

The import moves through six steps. You can close the page at any point, even on another computer, and come back to find it where you left it.

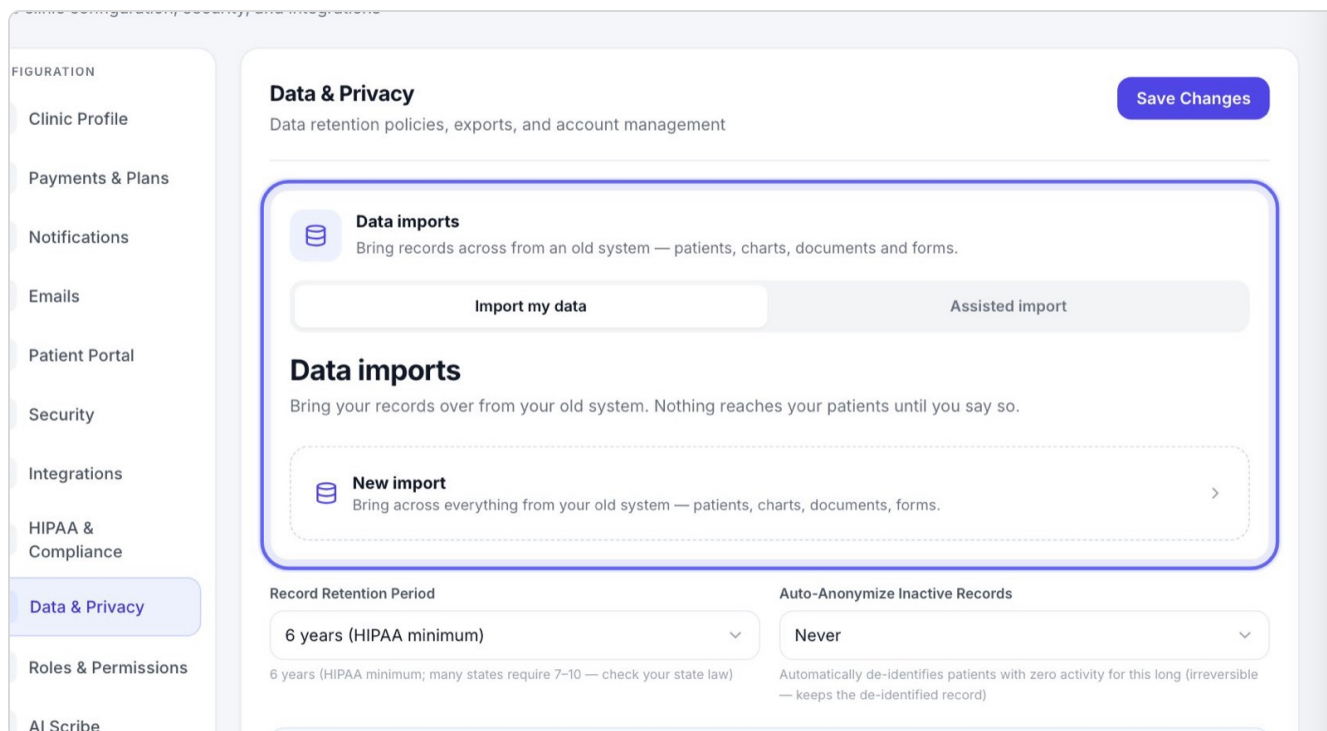
2. GET YOUR FILES FROM YOUR OLD SYSTEM

1. Export everything your old system lets you: patient lists, spreadsheets, and zipped folders of scanned documents.
2. A folder of charts needs the patient list beside it, so each chart can be matched to the right person.
3. You don't have to send it all at once. You can add more files later, in any order.

Tip. A product or stock list doesn't go here. Bring it in from Products → Import instead.

3. OPEN DATA IMPORTS

1. Go to **Settings** and pick **Data & Privacy**.
2. At the top is **Data imports**, with two tabs: **Import my data**, where you upload the files yourself, and **Assisted import**, where you send someone a secure upload link.
3. Stay on **Import my data** and press **New import**. If an import is already open, you see it instead.
4. Each step has a ? that explains it in plain words. **Contact support** is at the bottom of every step.



Settings → Data & Privacy → Data imports.

4. ADD YOUR FILES

1. Press **Choose files**, or **Choose a folder** to send a whole export folder.
2. Each file shows its progress, and a line under the list says when they have all arrived.
3. Picked the wrong one? Press the × beside it to take it out.
4. Press **Add more files** or **Add a folder** to send more. Nothing is read until you say so.
5. When everything is up, press **Read these files** (or **Read this file**).

5. OR SEND AN UPLOAD LINK

1. If someone else has the files, open the **Assisted import** tab.
2. Give the link a label if you like, then press **Create link**.
3. Copy the link and send it. Unless you ticked **Skip the code**, also send the code, in a separate message. The code is shown only once.
4. The link works once, and stops working on the date shown. Five wrong codes switch it off.
5. Whoever opens it can upload files, but can never read anything. What they send shows up in your imports on the same tab.

Data & Privacy
Data retention policies, exports, and account management

Data imports
Bring records across from an old system — patients, charts, documents and forms.

Import my data Assisted import

Data imports
Bring your records over from your old system. Nothing reaches your patients until you say so.

Create an upload link
Only Aminova creates these. You'll get a link and a code — send them to the clinic yourself, ideally by two different channels.

Label (optional) — who this link is for

☐ Skip the code — send just the link. Simpler for the clinic. They can upload, but never read anything.

Imports
No imports yet.

Record Retention Period: 6 years (HIPAA minimum)
6 years (HIPAA minimum; many states require 7–10 — check your state law)

Auto-Anonymize Inactive Records: Never
Automatically de-identifies patients with zero activity for this long (irreversible — keeps the de-identified record)

Assisted import: create a secure upload link and a code.

Tip. If your clinic has no patients in it yet, creating a link keeps everyone except owners and managers from signing in until the import is finished.

6. READING YOUR FILES

Aminova opens every file and works out what is in it: who your patients are, which documents belong to whom, and what kind of document each one is. A bar shows how far along it is.

Nothing has gone into your clinic yet. You can close the page, and it keeps going without you.

7. CHECK WHAT WE FOUND

1. Compare the numbers with what you expect, like how many patients you have.
2. If the file lists someone twice, they get one chart, not two. The screen tells you how many.
3. People missing something, most often a date of birth, still come across. You'll find them under **need details** on the Patients page.
4. A few sample charts show what the imported charts will look like.
5. Documents are counted by where they will be filed, like chart records, intake forms or lab results.

Tip. If you only uploaded a scan of your intake form, you're offered **Rebuild it as an intake form**. It arrives as a draft, and nothing is published to your patients.

8. COLUMNS WITH NOWHERE TO GO

1. Some columns in your files may have no place in Aminova. They're listed with how many rows have something in them.
2. Where there's a good match, press its **Keep as** button to bring that column across.
3. A column marked **Clinical**, like allergies or diagnoses, stops you until you tick the box saying you understand it won't come across.

9. APPROVE IT, OR START AGAIN

1. If the numbers look right, press **These numbers look right**.
2. If not, press **Start again with different files**. Nothing has reached your clinic yet, so starting again only clears what was read.

10. PUT IT INTO YOUR CLINIC

1. Press **Put it into my clinic**.
2. The patients are created and their records and documents are filed. The screen counts the records and documents as they go in.
3. This can take hours for a large practice. You can close the page. It carries on by itself, and coming back picks up where it got to.
4. If the import can't go in, each reason is listed. One marked **Stops the import** has to be fixed in your export and read again. Send the list to support and we'll tell you which column to change.

Peak Vitality Clinic

Growth Plan

Notifications9+

Dashboard

NTS

Patients

Care Plan

Intake Engine5

Consents

Appointments

My Schedule

Labs

Treatment Plans

Clinical Notes

COLS

Protocols

E-Prescriptions

Refills

Dr. Alex Rivera

Owner / Director

PATIENT	NEXT VISIT	LAST VISIT	PROTOCOL / PLAN	STATUS	BALANCE DUE	
WH Willa Hill PVC-E36985 Age 59 · willa.hill@demo.peakvitality.example	None booked	Jul 28	Walk-in	—	Onboarding	—
MF Marguerite Fenwicke Practice patient AMN-4311B7 Age 47 · marguerite.fenwicke@example.invalid	None booked	—	—	Active	—	
NT Nancy Torres PVC-A3F390 Age 48 · nancy.torres@demo.peakvitality.example	None booked	Jul 18	Walk-in	—	Onboarding	—
SN Silas Nguyen PVC-283802 Age 31 · silas.nguyen@demo.peakvitality.example	None booked	Jul 23	Walk-in	—	Onboarding	—
VS Victor Scott PVC-3EF815 Age 65 · victor.scott@demo.peakvitality.example	None booked	Jul 16	Walk-in	—	Onboarding	—
RF Rhett Flores PVC-70EFD6 Age 42 · rhett.flores@demo.peakvitality.example	None booked	Aug 13	—	—	Onboarding	—
MA Michael Anderson PVC-9778D5 Age 62 · michael.anderson@demo.peakvitality.example	Oct 1 injection-visit	Sep 18	TRT Optimization · Week 11	Inactive	—	
JH Jolene Harris PVC-32BB90 Age 52 · jolene.harris@demo.peakvitality.example	Oct 1 wrinkle-relaxer-tox	Sep 24	Semaglutide Weight Management · Week 11 Optimize — Monthly	Inactive	—	
SR Sabine Ramirez PVC-3C59DC Age 46 · sabine.ramirez@demo.peakvitality.example	Sep 29 injection-visit	Sep 22	Tirzepatide Weight Loss · Week 4	Active	—	
OW Otis Walker PVC-C0C7C7 Age 30 · otis.walker@demo.peakvitality.example	Oct 8 follow-up	Sep 18	Sermorelin GH Therapy · Week 10 Optimize — Monthly · past due	Active	—	
... Matthew Walker PVC-D3D944	Oct 6		BPC-157 Recovery			

Once it's in, your patients are on the Patients list.

11. HAVE A LOOK AROUND

1. Open a few patients. Look at their documents under **Forms & Files**, and check your forms.
2. Nothing is final yet. Take your time; nothing runs out.
3. If something is wrong, an owner presses **Undo this import**. It removes everything the import added.
4. If it all looks right, an owner presses **Everything looks right**. A manager sees a note asking an owner to finish.

A patient's documents are on their chart, under Forms & Files.

12. IMPORT COMPLETE

1. Your import is now your clinic's live data. It can no longer be undone.
2. Your uploaded files are kept for 30 days, in case anything needs putting right. After that, you can press **Remove the uploaded files**.
3. To bring over something else later, like appointments or a file you found, press **Start another import**. Anyone already in your clinic is matched to their chart, never added twice.

13. FINISH CHARTS THAT NEED DETAILS

1. On the Patients page, an amber button says how many patients **need details**. Click it to see only them.
2. Each row says what is missing, like a date of birth or a phone or email.
3. Open the chart, fill it in, and save. The patient's portal ID is issued on its own.

14. TELL YOUR PATIENTS

1. When you're ready, go to Patients and press **Select**.
2. Tick the patients, then press **Email sign-in details**. You can send to the ones you ticked or to everyone.
3. You see how many will get one, and who is left out and why, before anything is sent. Patients who already set a password are left out.
4. Or, on the last import step, press **Ask us to send these** and we'll go through the list with you first.

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

Patients

103 total

2 need details - show

Search by name, email, or chart number...

Filters

Done

Tick patients to act on them

Cancel

PATIENT	NEXT VISIT	LAST VISIT	PROTOCOL / PLAN	STATUS	BALANCE DUE
☐ WH Willia Hill PVC-E36995 Age 59 - willia.hill@demo.peakvitality.example	None booked	Jul 28 Walk-in	—	Onboarding	—
☐ MF Marguerite Fenwicke Practice patient AME-4311B7 Age 47 - marguerite.fenwicke@example.invalid	None booked	—	—	Active	—
☐ NT Nancy Torres PVC-A3F390 Age 48 - nancy.torres@demo.peakvitality.example	None booked	Jul 18 Walk-in	—	Onboarding	—
☐ SN Silas Nguyen PVC-283802 Age 31 - silas.nguyen@demo.peakvitality.example	None booked	Jul 23 Walk-in	—	Onboarding	—
☐ VS Victor Scott PVC-3EF815 Age 65 - victor.scott@demo.peakvitality.example	None booked	Jul 16 Walk-in	—	Onboarding	—
☐ RF Rhett Flores PVC-70EFD6 Age 42 - rhett.flores@demo.peakvitality.example	None booked	Aug 13	—	Onboarding	—
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☐ JH Jolene Harris PVC-32BB90 Age 52 - jolene.harris@demo.peakvitality.example	Oct 1 wrinkle-relaxer-tox	Sep 24	Semaglutide Weight Management Week 11 Optimize —	Inactive	—

Select patients, then email them their sign-in details.