Invite your team

Give everyone at your clinic their own login, with the right role. Then add providers' credentials so patients can be booked with them.

Setup guide · For Owners, Managers · aminova.health/university/invite-your-team

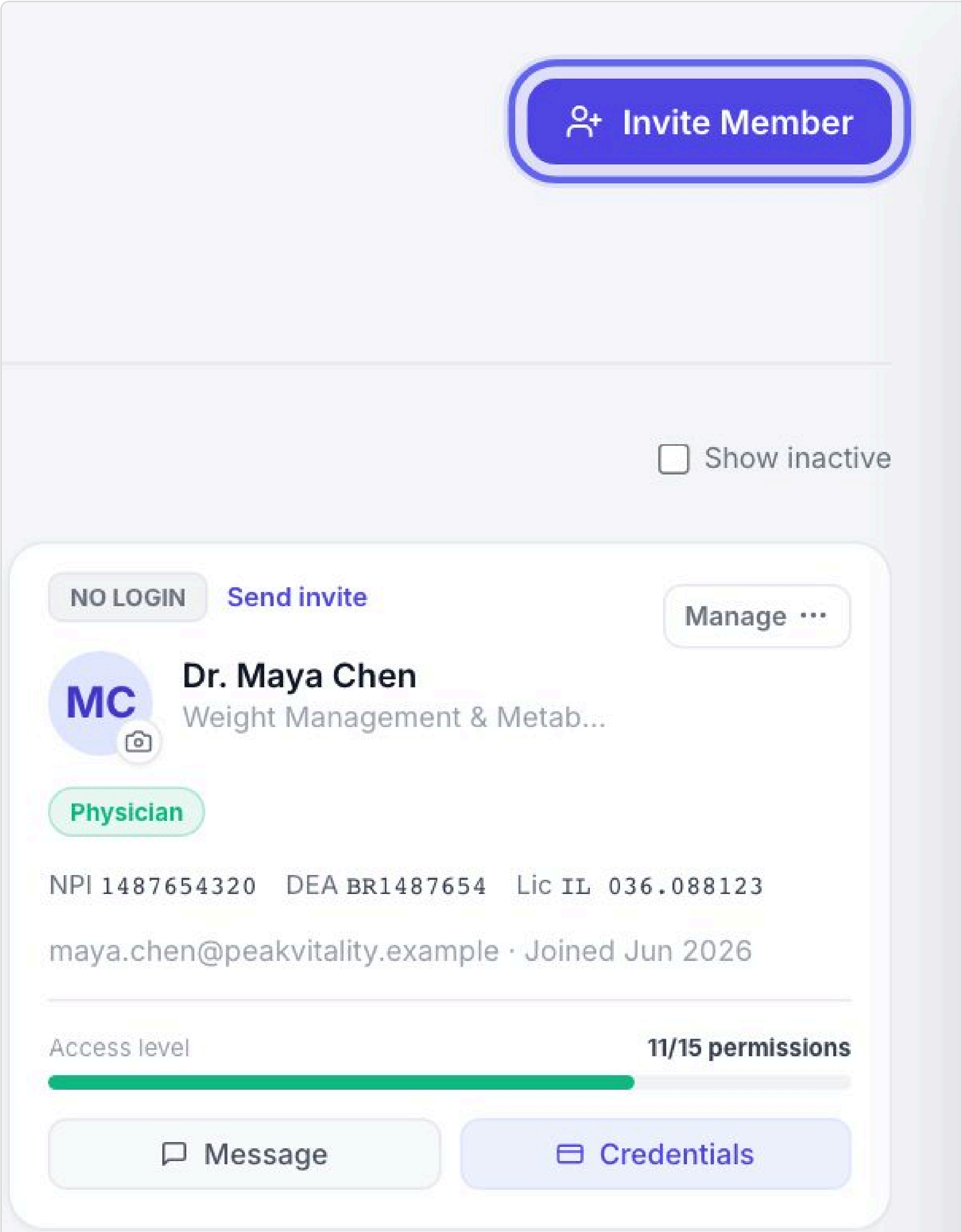
1. BEFORE YOU START

Everyone who works at your clinic gets their own login. Never share one. Each person's role decides what they can see and do.

Have each person's full name, work email and job ready. For providers, have their NPI, DEA and license numbers too.

2. OPEN TEAM

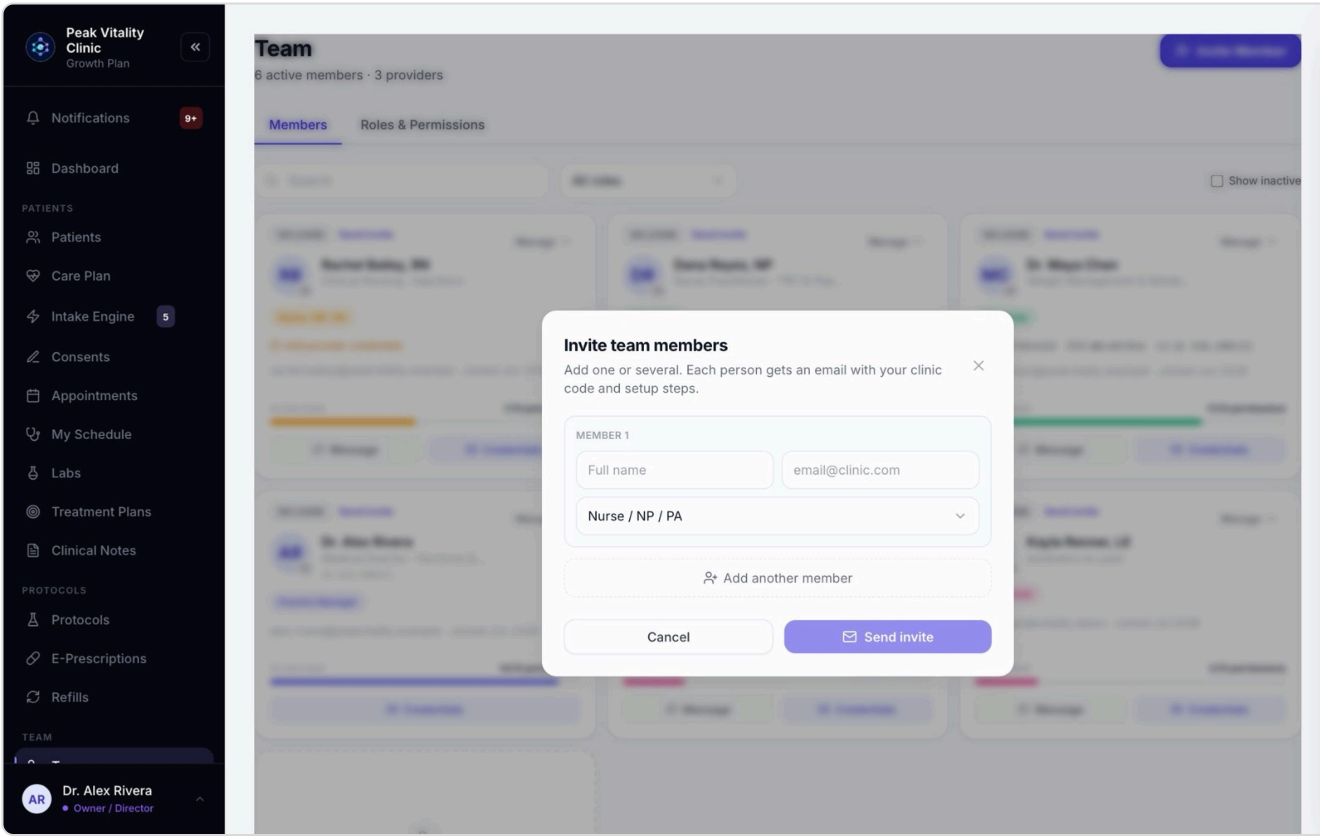
1. Go to **Team** in the sidebar.
2. Click **Invite Member** at the top right.



Invite Member, at the top of the Team page.

3. ADD EACH PERSON

1. Type their **Full name** and their email.
2. Pick their role. The roles are Owner / Director, Practice Manager, Physician, Nurse / NP / PA, Medical Assistant, Front Desk and Billing Specialist.
3. Click **Add another member** for the next person. **Remove** takes a row out.
4. Press **Send invite**. With several people, it says **Send invites**.

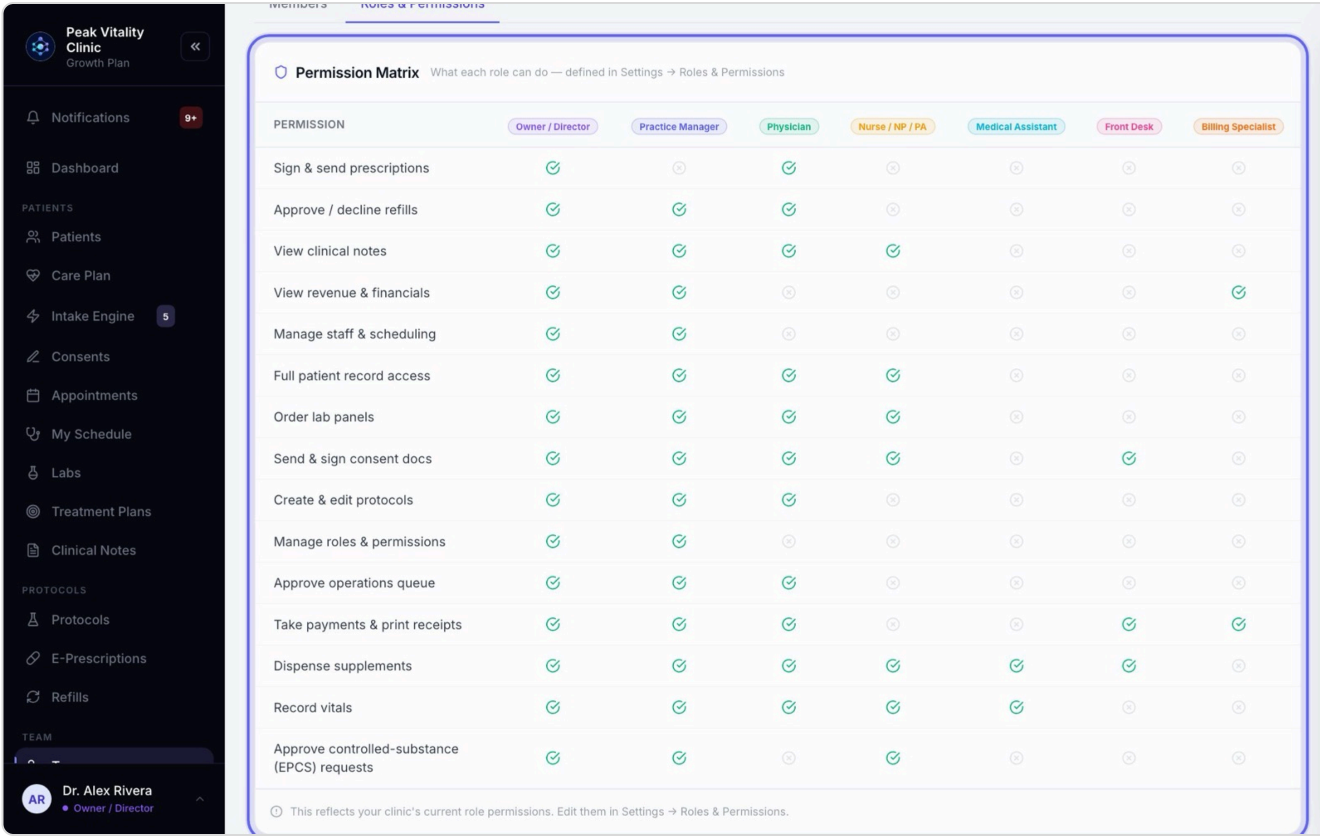


Invite several people at once: a name, an email and a role for each.

Tip. Only an owner can invite another owner. If a manager picks Owner / Director, the person joins as a Practice Manager.

4. CHECK WHAT EACH ROLE CAN DO

1. Open the **Roles & Permissions** tab on the Team page.
2. Each row is something a person can do. A check means that role can do it.
3. To change what a role can do, go to **Settings** and open **Roles & Permissions**.



Roles & Permissions: what each role can do in your clinic.

5. WHAT THEY GET

1. Each person gets an email with your clinic code and an **Open Aminova** button.
2. They choose **First time here? Set up your account** and enter the clinic code if asked.
3. They enter the email you invited, and type the 6-digit code sent to it.
4. They create a password and get their own Employee ID. They sign in with their email or that ID.

Tip. Tell your team to use the exact email you typed. A different address won't match the invite.

6. WATCH WHO HAS JOINED

1. Invites not accepted yet are listed under **Pending Invitations**.
2. An invite lasts 7 days. **Refresh** sends the email again and gives them 7 more days.
3. **Cancel** takes an invite back, like one sent to the wrong person.
4. Once someone finishes setting up, they leave this list.

7. STAFF ALREADY ON THE LIST

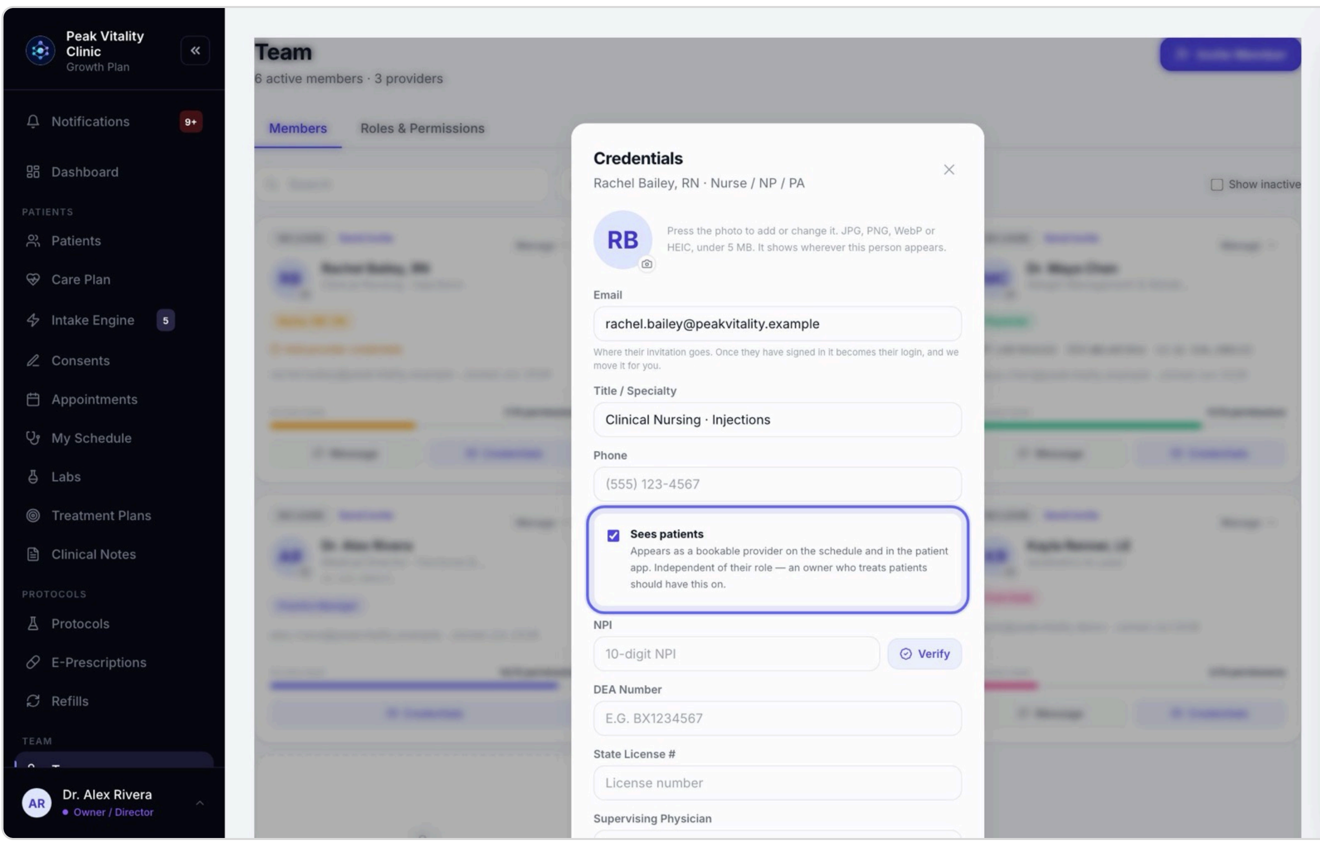
1. If your staff came over from another system, their cards may show **NO LOGIN**.
2. Click **Send invite** on the card. Check the name and email, then press **Send invite**.
3. The card shows **INVITE SENT** until they finish setting up.

8. FIX A WRONG EMAIL

1. Click **Credentials** on their card and change **Email**. Press **Save**.
2. If they had a pending invite, it goes again to the new address.

9. ADD PROVIDERS' CREDENTIALS

1. On a provider's card, click **Credentials**.
2. Tick **Sees patients**. Only people with this ticked can be booked.
3. Add their **NPI** and press **Verify**. Add their **DEA Number**, **State License #** and **License Expiry**. Add a **Supervising Physician** if they need one.
4. Under **Licensed States**, type each two-letter state code and press Enter.
5. Press **Save**.



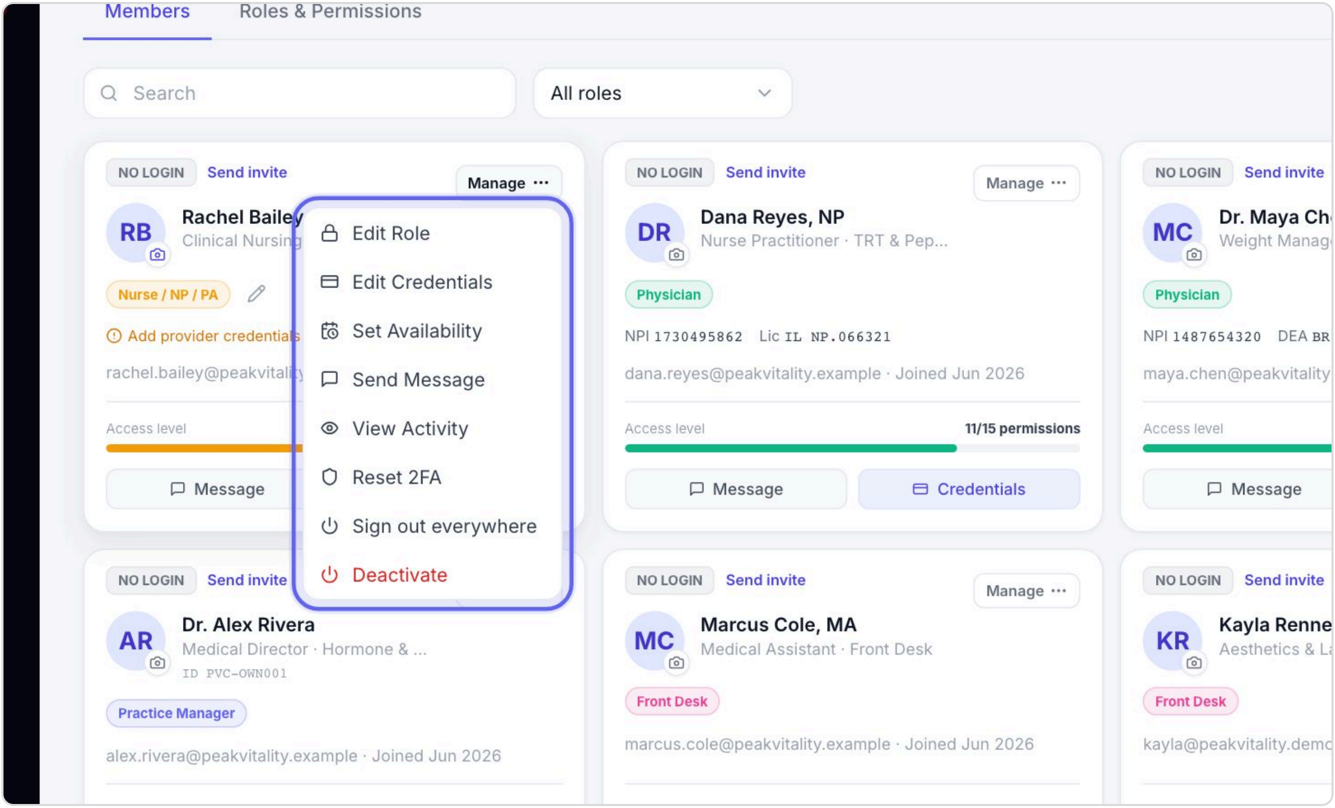
Credentials: tick Sees patients, then add the provider's numbers.

Tip. Do you treat patients yourself? Open your own card and tick Sees patients too. You stay an owner.

10. SET WHEN THEY WORK

Patients can only book a provider when they are working. Put their shifts on the roster in **Staff Scheduling**. The Set up staff shifts guide shows how.

For someone without shifts, open **Manage** on their card and choose **Set Availability** to set their usual week.



The Manage menu on a card, where Set Availability lives.

11. CHECK NOTHING IS LEFT OVER

1. Look for a **Not on the staff list** box on the Team page. It lists people who can sign in but can't have visits.
2. Click **Add to staff list** for each one.
3. You're done when every card has no **NO LOGIN** tag and **Pending Invitations** is empty.