

Set up your patient app

Choose your clinic code, what patients can do in the app, who they can message, and what they are told. Then give patients their sign-in details.

Setup guide · For Owners, Managers · aminova.health/university/patient-app-setup

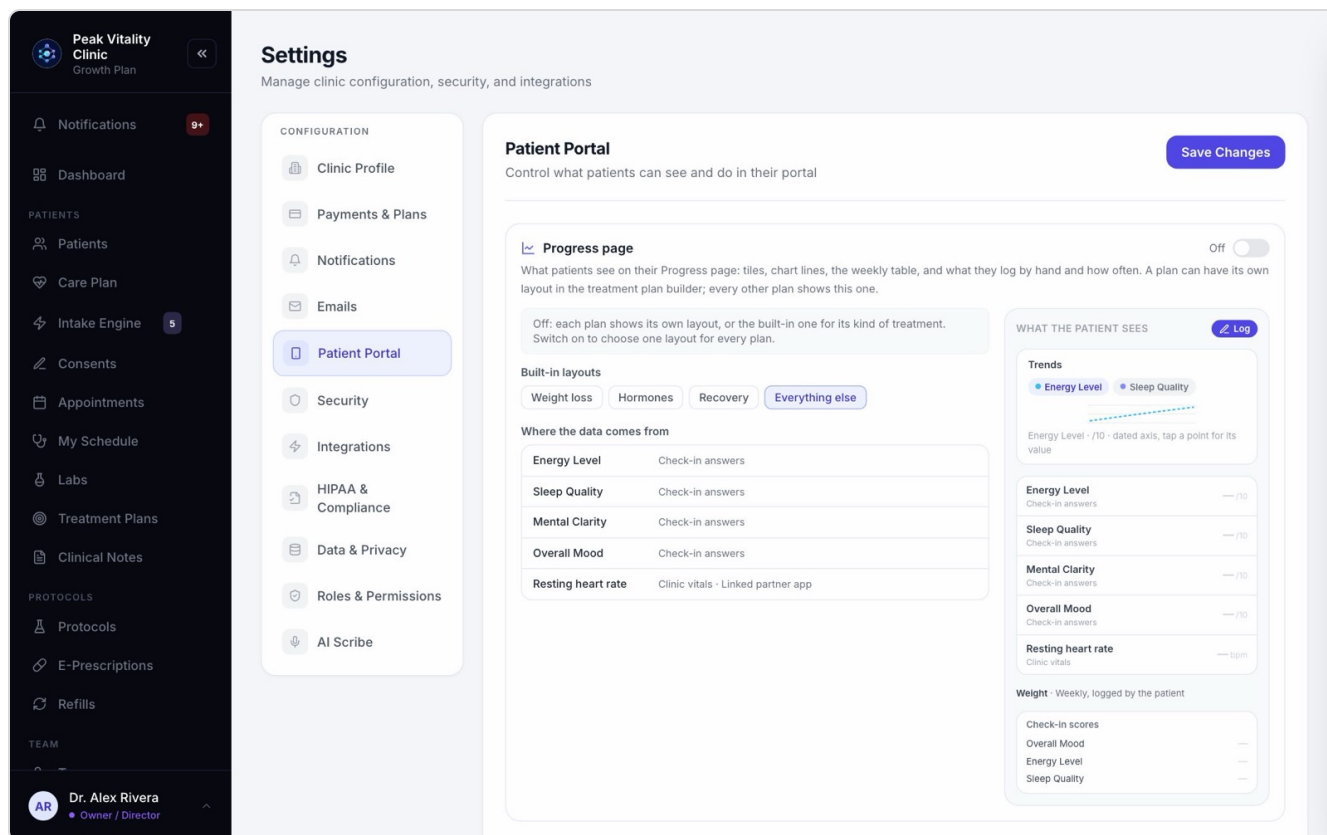
1. WHAT YOU'RE SETTING UP

Your patients use the app to book visits, fill in forms, message your team, see their plan and track their progress. You decide which of those they get.

Everything here is in **Settings** → **Patient Portal**. Only owners and managers can open Settings.

2. OPEN THE PATIENT PORTAL SETTINGS

1. Go to **Settings** in the sidebar.
2. Click **Patient Portal** in the list on the left.
3. Changes save on their own a moment after you make them. You can also press **Save Changes** at the top.



Settings → Patient Portal.

3. CHOOSE YOUR ACCESS CODE

1. Under **Patient Access Code** is your clinic's code. Patients type it to connect to your clinic in the app. Press the copy button to copy it.
2. To change it, type a new one under **Set a new access code**: 4 to 8 letters or numbers. Wait for **Available**, then press **Save**.
3. Check it and press **Yes, set this code**.

Check-in scores
Overall Mood
Energy Level
Sleep Quality

Patient Access Code

AMINO1

Your current access code — share this with patients.

Set a new access code

Enter a new code

Save

Once changed, this code locks for 60 days.
Required. Patients enter this exact code to connect to your clinic in the portal — it's how everyone gets in. Choose carefully: it locks for 60 days after each change.

Portal Features

Check-ins
Patients answer a short check-in on their plan

Hydration Goal

Your patient access code, and where to set a new one.

Tip. Choose carefully. Once changed, the code locks for 60 days, and anyone you gave the old code to will need the new one.

4. CHOOSE WHAT PATIENTS CAN DO

1. Under **Portal Features**, switch each feature on or off.
2. **Secure Messaging** lets patients message your team. **Lab Results** shows their lab history. **Lab Ordering** lets them request lab panels. **Refill Requests** lets them ask for refills.
3. **Appointment Booking** lets them book their own visits.

Hydration Goal A daily water goal on the patient's plan	☒
Pickup or Delivery Step Medication starts once the patient confirms they have it. Turn off if you give it in clinic	☒
Patients can log their own injections Turn off if your team gives and records every injection	☒
Secure Messaging Patients can message their care team directly	☒
Lab Results Patients can view their full lab history	☒
Lab Ordering Patients can request lab panels from the app	☒
Refill Requests Patients can request prescription refills	☒
Appointment Booking Patients can self-schedule appointments	☐
Instant Booking Confirm patient bookings automatically, without front-desk approval	☐
Match Providers to Patient State Only offer times from clinicians licensed in the state on the patient's chart	☐
Book to the Practice, Not a Clinician Confirm against how many clinicians are working, and attach one closer to the visit — a call-out needs no reassigning	☐
Hide Provider Name Patients book with the practice, not a named clinician — shows "Your care team"	☐
Show FAQs in the patient app No FAQs are written yet — add them below. Until then this stays off unless you switch it on. On by default once an FAQ is written.	☐
Ask for Health Background in the welcome flow	☐

Portal Features: switch each part of the app on or off.

5. SET HOW PATIENTS BOOK

1. **Instant Booking** confirms patient bookings on their own. Leave it off and the front desk approves each one.
2. **Match Providers to Patient State** only offers times from clinicians licensed in the state on the patient's chart.
3. **Book to the Practice, Not a Clinician** confirms a booking when enough clinicians are working, and puts one of them on it closer to the visit.
4. **Hide Provider Name** shows "Your care team" instead of a clinician's name.

6. SET UP THE PATIENT'S PLAN

1. **Check-ins:** patients answer a short check-in on their plan.
2. **Hydration Goal:** a daily water goal on their plan.
3. **Pickup or Delivery Step:** their medicine starts once they confirm they have it. Turn it off if you give it in the clinic.
4. **Patients can log their own injections:** turn it off if your team gives and records every injection.

7. THE HEALTH BACKGROUND STEP

The first time a patient opens the app, a welcome flow can ask for their conditions, allergies, medicines, height, weight, sex and blood type. That's **Ask for Health Background in the welcome flow**.

Anything your intake form already collected is shown back for them to confirm. Turn it off if your own intake form covers this, and make sure that form asks for allergies and medicines.

8. ADD YOUR FAQs

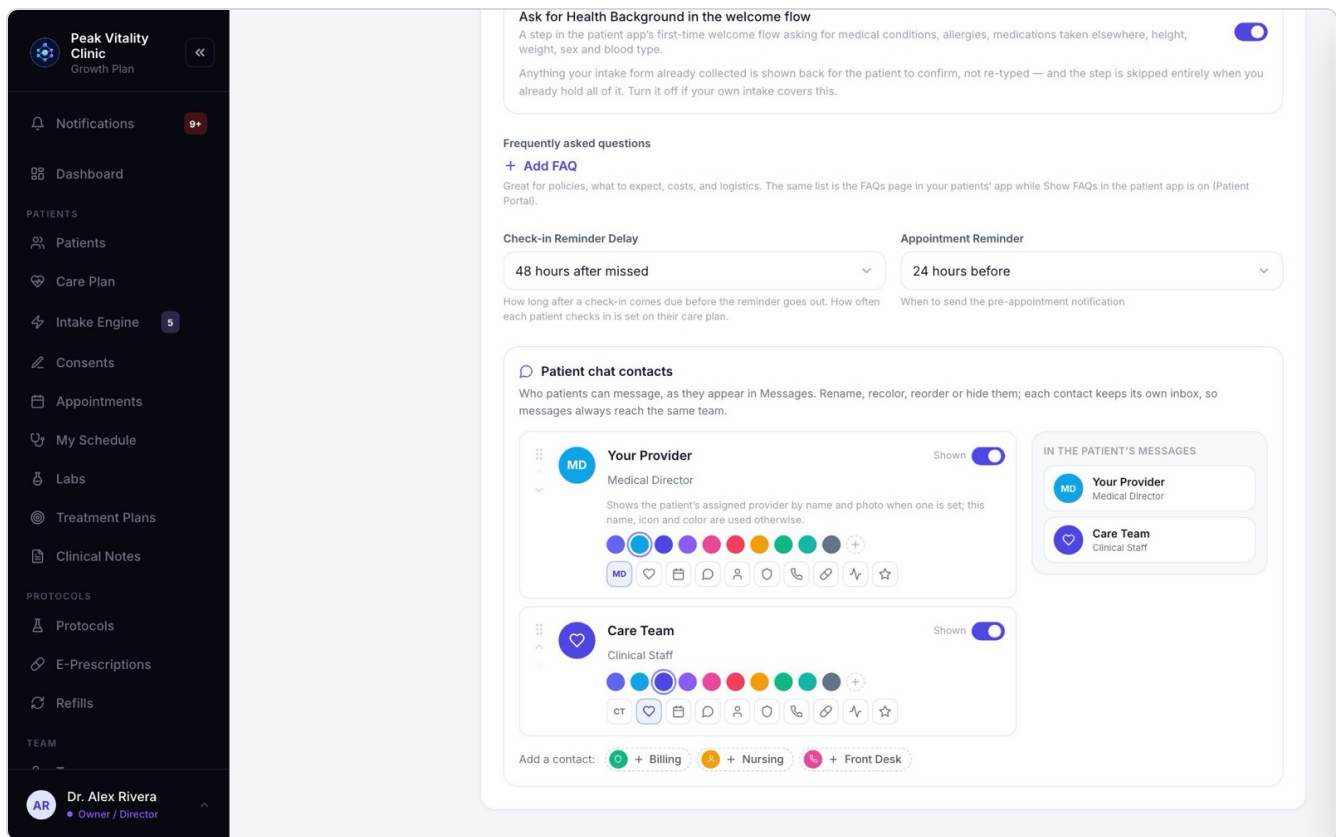
1. Under **Frequently asked questions**, press **Add FAQ**.
2. Type the question next to **Q** and the answer next to **A**. Good ones cover costs, policies and what to expect.
3. Switch on **Show FAQs in the patient app** to give patients a searchable FAQ page. Once you've written one, it's on unless you switch it off.

9. SET YOUR REMINDERS

1. **Check-in Reminder Delay**: how long after a missed check-in the reminder goes out, or **Disabled**.
2. **Appointment Reminder**: how long before a visit patients are reminded, from 2 to 72 hours.

10. CHOOSE WHO PATIENTS CAN MESSAGE

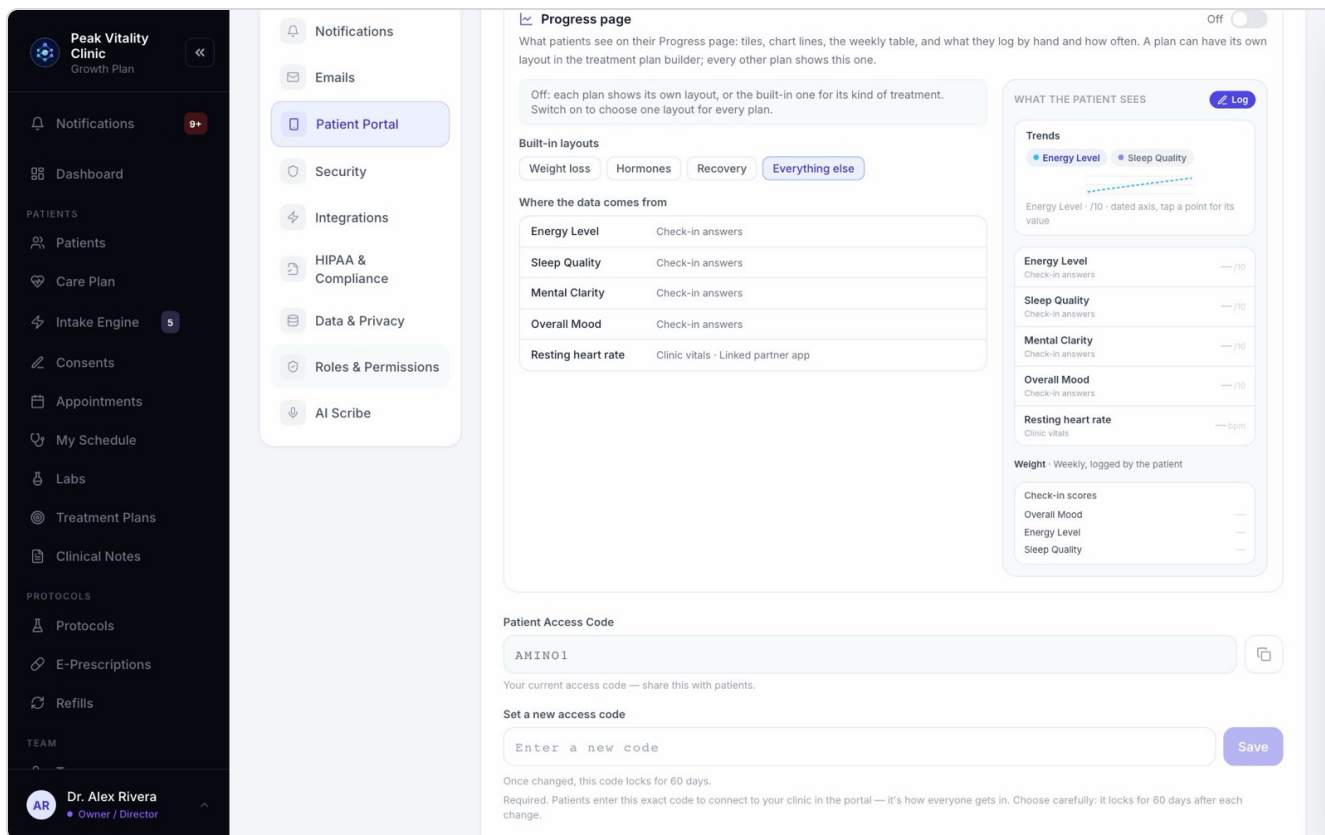
1. Under **Patient chat contacts**, rename, recolor, reorder or hide each contact.
2. Use **Add a contact** to bring one back.
3. The box on the right shows the list as patients see it in Messages. Each contact keeps its own inbox, so messages always reach the same team.



Patient chat contacts, with a preview of what patients see.

11. THE PROGRESS PAGE

1. At the top of Patient Portal is **Progress page**: what patients see when they track their progress.
2. Leave it off and each plan uses its own layout. Switch it on to use one layout for every plan.
3. When it's on, set it up and press **Save layout**. This one doesn't save on its own.



The Progress page layout, with a preview beside it.

12. CHOOSE WHAT PATIENTS ARE TOLD

1. Click **Notifications** on the left.
2. For each event, choose **In-App**, **Push** to their phone, **Email**, or any mix. Texts aren't offered.

Payments & Plans

Notifications

Emails

Patient Portal

Security

Integrations

HIPAA & Compliance

Data & Privacy

Roles & Permissions

AI Scribe

EVENT	IN-APP	PUSH	EMAIL
Appointment confirmed	☒	☒	☒
Appointment Reminder (24h)	☒	☒	☒
Appointment provider changed	☒	☒	☒
New Lab Results Ready	☒	☒	☒
Prescription sent	☒	☒	☒
After-visit summary	☒	☒	☒
Payment reminder	☒	☒	☒
Missed Check-in	☒	☒	☒
Forms to complete	☒	☒	☒
Lab request decision	☒	☒	☒
Payment receipt	☒	☒	☒
Consent countersigned	☒	☒	☒
Treatment plan update	☒	☒	☒
Dose reminder	☒	☒	☐
Refill due soon	☒	☒	☒
Workflow messages	☒	☒	☒

Notifications: which events reach patients, and how.

13. GIVE PATIENTS THEIR SIGN-IN DETAILS

1. When you add a patient, you see their **Activation details**: your **Clinic code** and their **User ID**. Copy them, or email them.
2. For many patients at once, go to **Patients**, press **Select**, tick them, and press **Email sign-in details**.

Tip. Practice patients never get emails, texts or bills, so they're left out of sign-in emails.