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

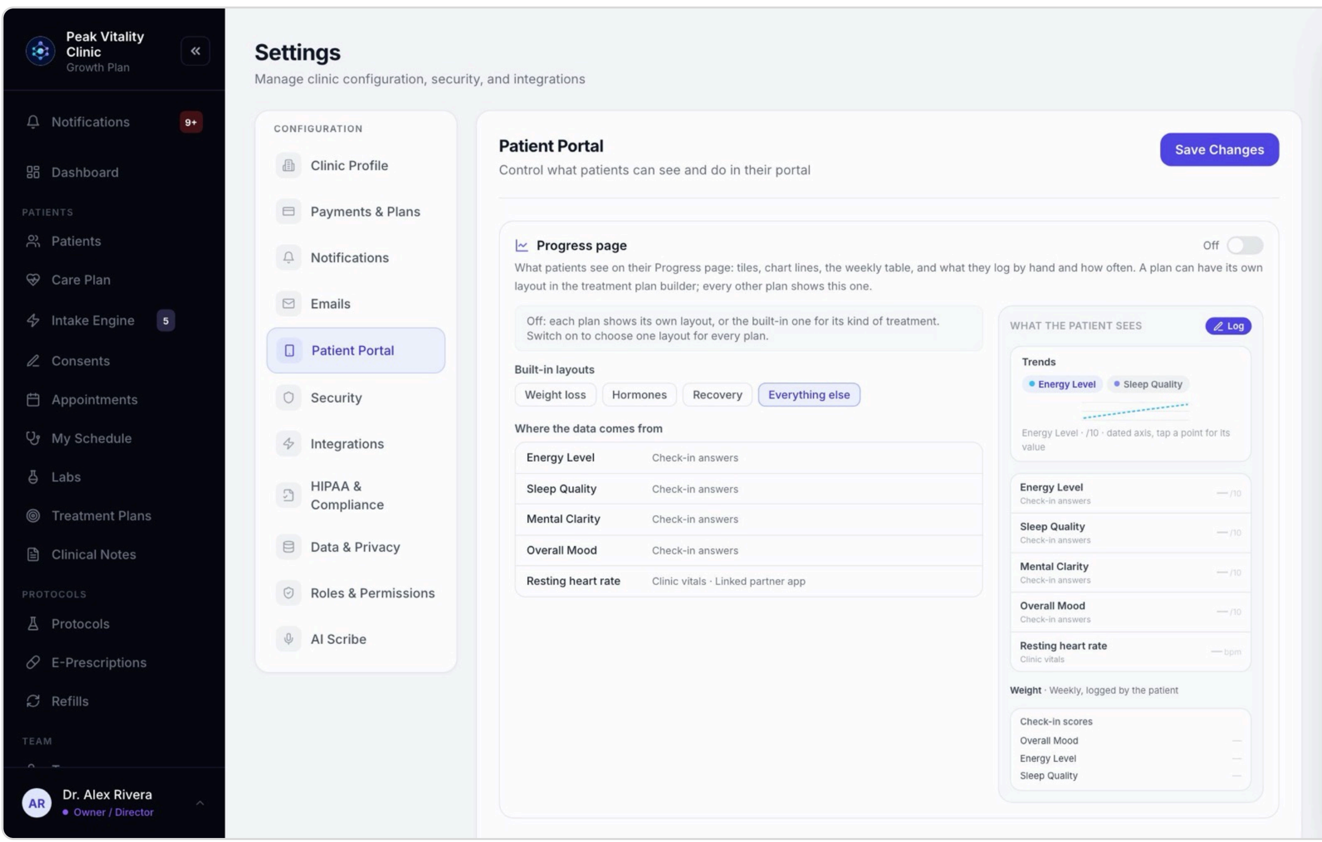
1. WHAT YOU'RE SETTING UP

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

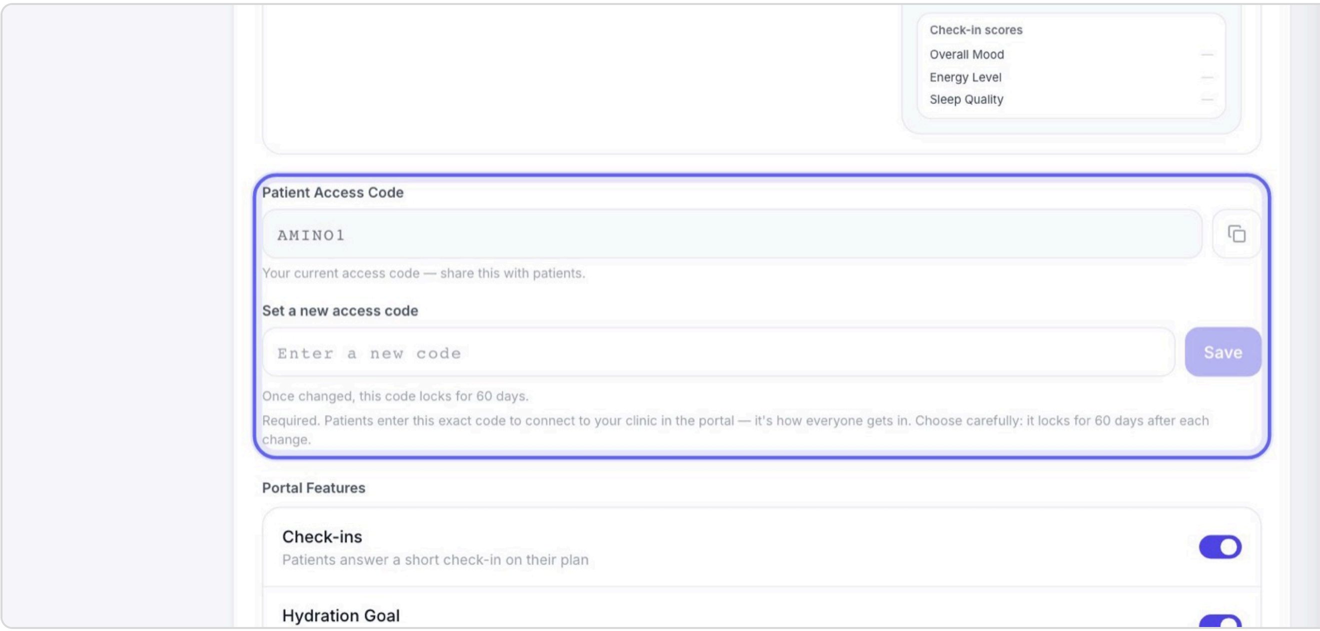
1. Go to **Settings** in the sidebar.
2. Click **Patient Portal** in the list on the left.
3. Changes save on their own a moment after you make them. You can also press **Save Changes** at the top.



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**.

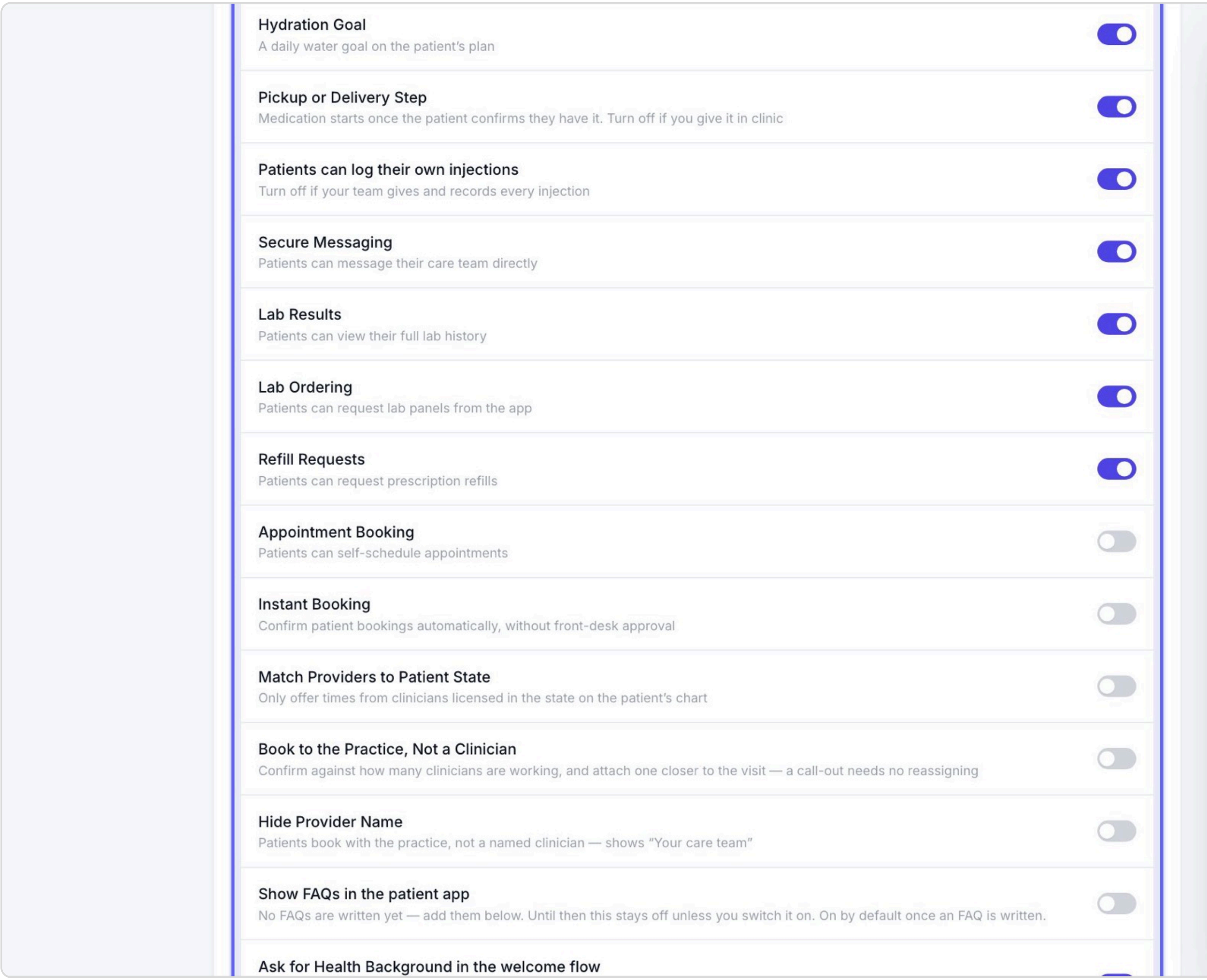


Your patient access code, and where to set a new one.

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.



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

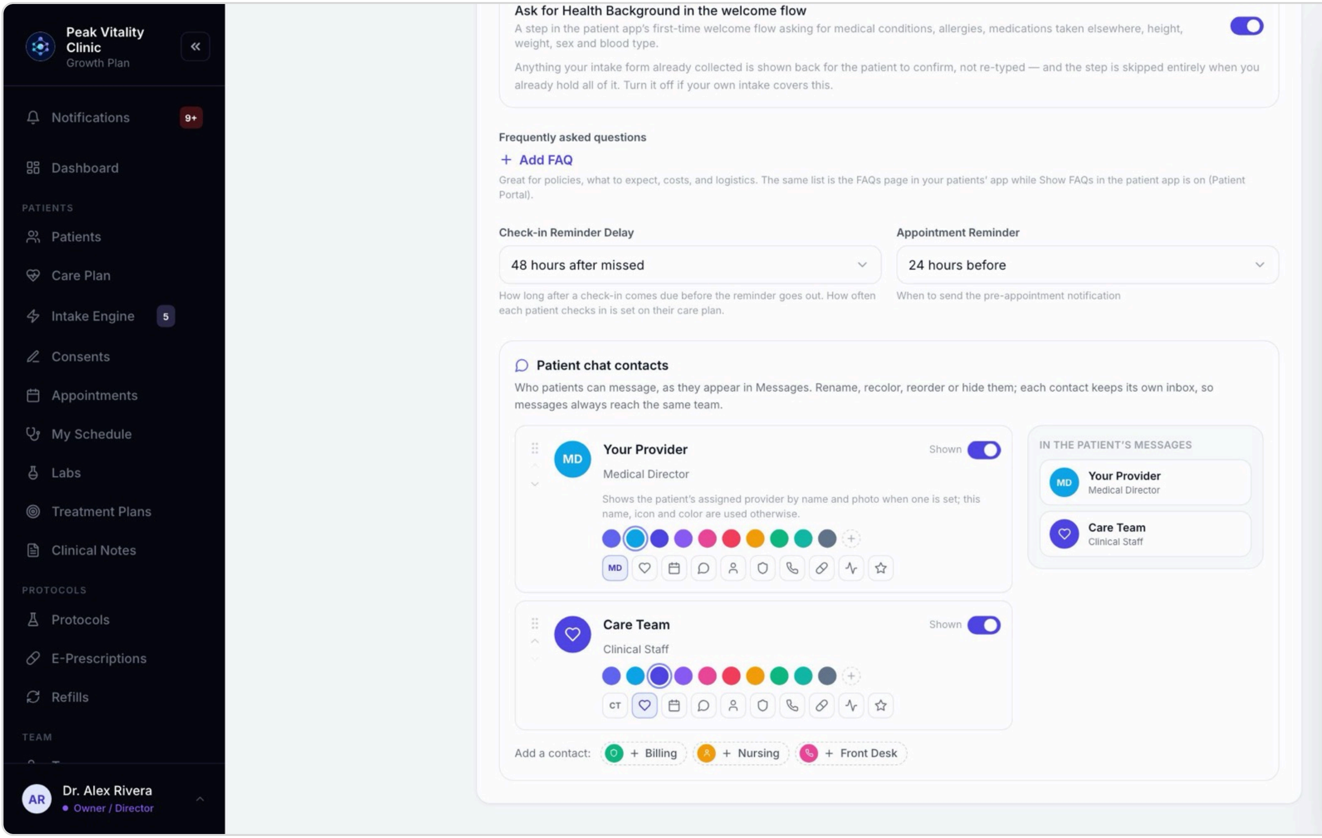
1. Under **Frequently asked questions**, press **Add FAQ**.
2. Type the question next to **Q** and the answer next to **A**. Good ones cover costs, policies and what to expect.
3. Switch on **Show FAQs in the patient app** to give patients a searchable FAQ page. Once you've written one, it's on unless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

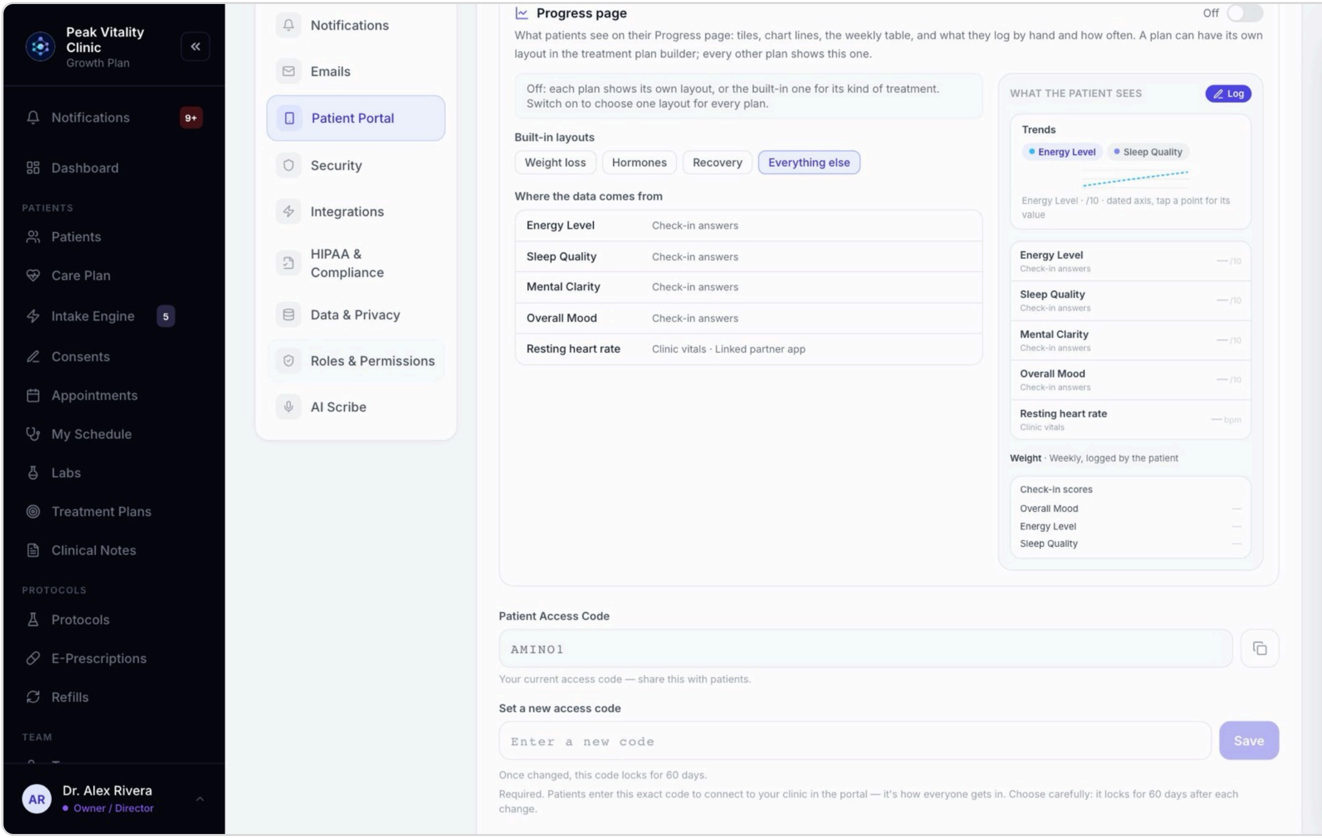
1. Under **Patient chat contacts**, rename, recolor, reorder or hide each contact.
2. Use **Add a contact** to bring one back.
3. The box on the right shows the list as patients see it in Messages. Each contact keeps its own inbox, so messages always reach the same team.



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

11. THE PROGRESS PAGE

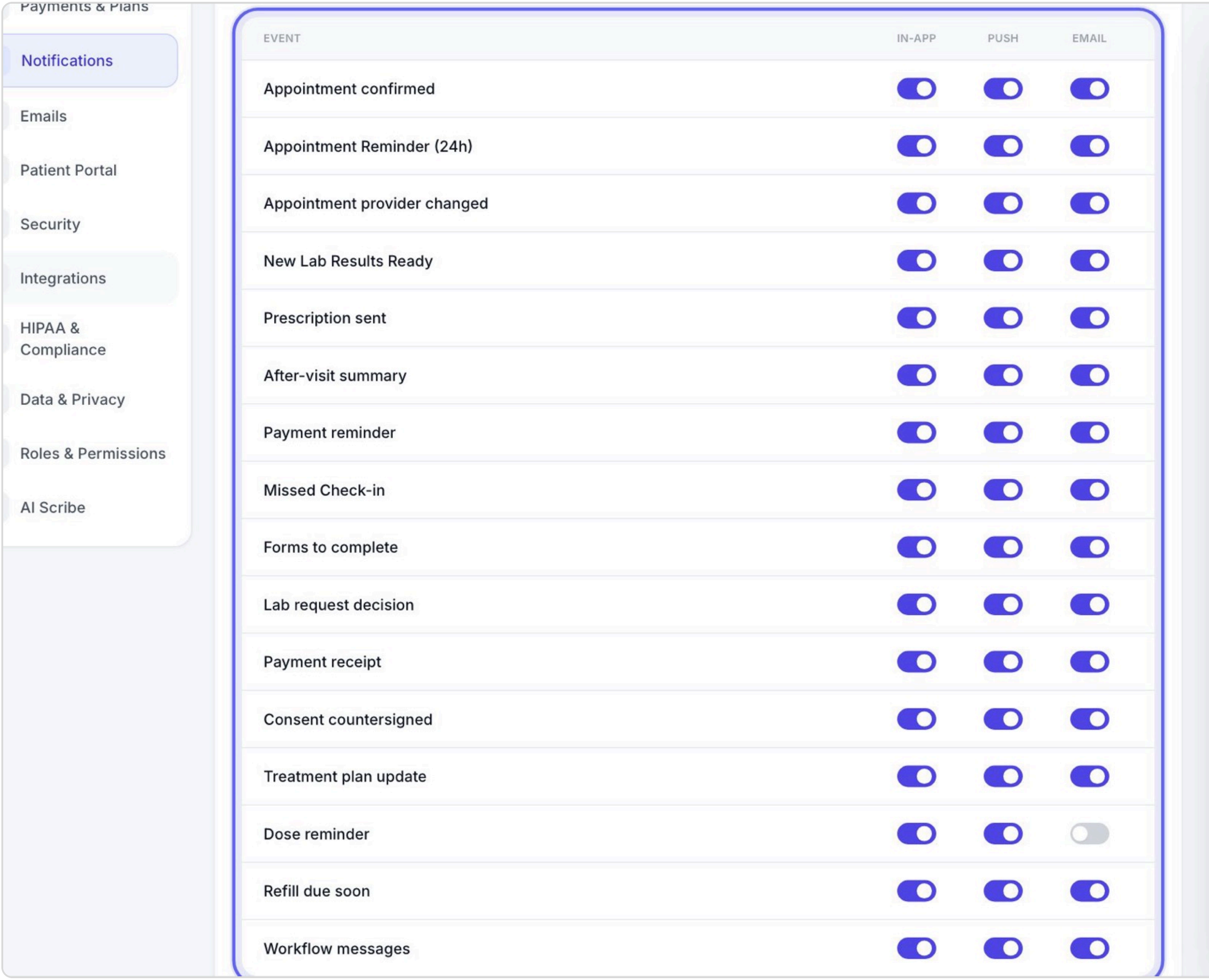
1. At the top of Patient Portal is **Progress page**: what patients see when they track their progress.
2. Leave it off and each plan uses its own layout. Switch it on to use one layout for every plan.
3. When it's on, set it up and press **Save layout**. This one doesn't save on its own.



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.



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.