

The patient chart

Everything about one patient on one page. The header says who they are and what's next; the tabs below hold each part of their record.

Page manual · For Everyone who works with patients · aminova.health/university/patient-chart

1. THE PAGE AT A GLANCE

Open a chart by clicking a patient on the Patients page. At the top is the header: who they are, how to reach them, and your quick actions. Below it is a row of tabs, one for each part of their record.

You only see the tabs your role can open. **Back to Patients** at the top left takes you back to the list.

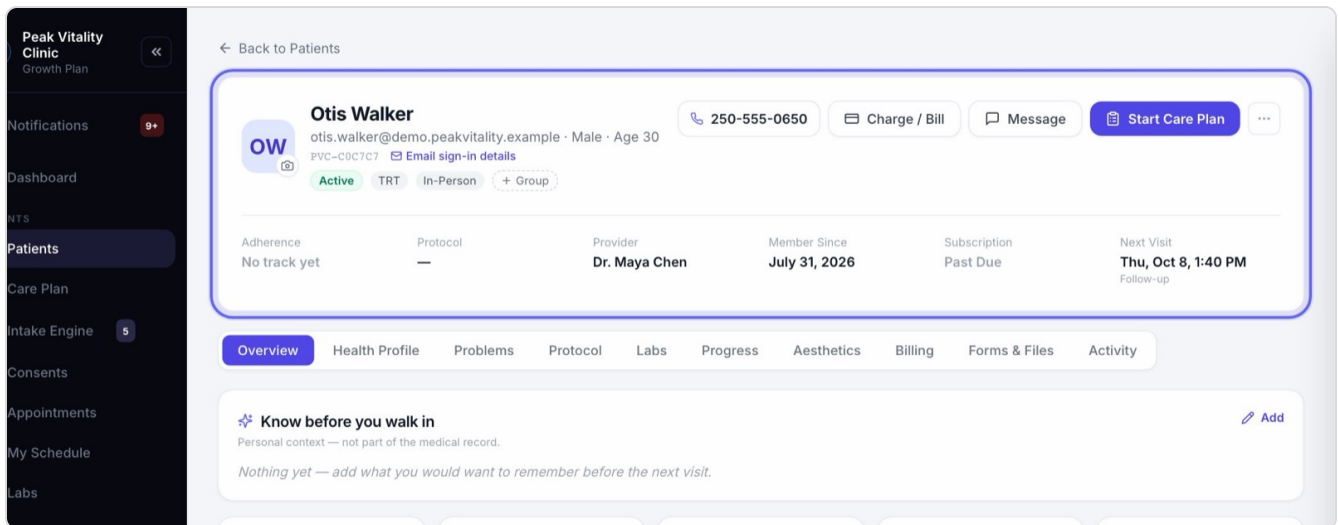
The screenshot shows the patient chart for Otis Walker. The interface includes a sidebar on the left with navigation options like Notifications, Dashboard, Patients, Care Plan, Intake Engine, Consents, Appointments, My Schedule, Labs, Treatment Plans, Clinical Notes, Protocols, E-Prescriptions, Refills, and Team. The main content area has a header for Otis Walker with contact information and quick actions (Charge / Bill, Message, Start Care Plan). Below the header is a row of tabs: Overview (selected), Health Profile, Problems, Protocol, Labs, Progress, Aesthetics, Billing, Forms & Files, and Activity. The Overview tab displays a 'Know before you walk in' section, a summary of vital signs (Weight: 174 lbs, BMI: 24.5, Height: 6'0", Blood Type: B+, Protocol WK: —), and a 'Credits & Membership' section showing a suspended 'Optimize — Monthly' plan and 'Included visits' (3 of 3 left this month).

A patient's chart, open on the Overview tab.

2. THE HEADER

1. Click the photo to add or change it.
2. Under the name are their email, sex and age, then their portal ID with a button to email them their sign-in details.
3. If the chart has no portal ID yet, an amber note says what is missing. Add it and save, and the ID is issued on its own.

- The colored tags show their status, protocols, tags and groups. Press **Group**, the dashed tag with a plus, to add them to a group.
- The strip along the bottom shows **Adherence**, **Protocol**, **Provider**, **Member Since** and **Next Visit**, plus **Subscription** for people who see money. Hover **Provider** and click the pencil to switch provider.



The header: who they are, their tags, and what's next.

3. QUICK ACTIONS

- Click their phone number to call them from your own phone. Afterwards, pick how the call went and add a note if you like. It's saved to the chart. Closing the question saves nothing.
- Charge / Bill** opens **Collect payment: Charge a card** now, or **Email a bill** they pay later. A practice patient never gets a bill.
- Message** opens a small chat window. What you send goes to their patient app.
- Start Care Plan** opens the Care Plan page for this patient.

The screenshot shows a patient record interface. At the top, there's a header bar with a phone icon and the number 250-555-0650, a calendar icon and the text 'Charge / Bill', a speech bubble icon and the text 'Message', a document icon and the text 'Start Care Plan', and a three-dot menu icon. Below this, the patient's name 'vitality.example · Male · Age 30' is displayed, followed by a link 'in details' and a '+ Group' button. The main content area shows a table with columns for 'Provider', 'Member Since', and 'Subscription'. The provider is 'Dr. Maya Chen', the member since is 'July 31, 2026', and the subscription is 'Past Due'. Below the table, there's a tabbed interface with tabs for 'Problems', 'Protocol', 'Labs', 'Progress', 'Aesthetics', 'Billing', and 'Forms & Files'. The 'Problems' tab is currently selected. At the bottom, there's a section for 'record.' with a note 'want to remember before the next visit.'.

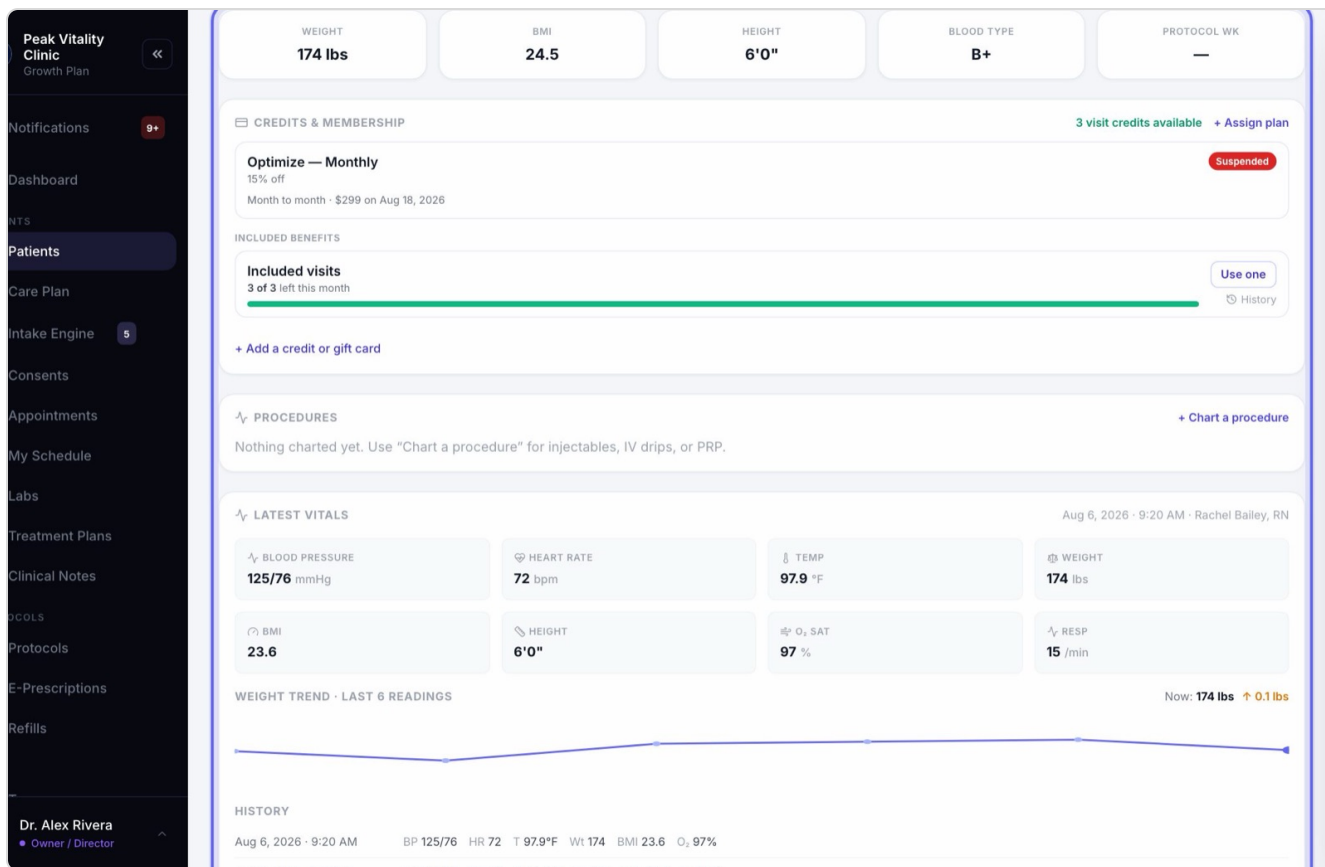
The three-dot menu is open, showing the following options:

- Edit Profile
- Change Status
- Assign Provider
- Send Message
- Request Refill
- Record Outside Rx
- Discharge / Transfer
- Archive Patient
- Delete Patient

The three-dot menu holds everything else you can do to the record.

5. OVERVIEW

1. **Know before you walk in** is for personal things worth remembering, like their kids' names or a trip. It isn't part of the medical record. Press **Add** or **Edit**.
2. Next come their weight, BMI, height, blood type and protocol week.
3. **Credits & Membership** shows their visit credits and memberships. **+ Assign plan** gives them a membership or package.
4. **Procedures** lists charted procedures. **+ Chart a procedure** records one, like an injectable or an IV drip.
5. **Vitals** shows the latest reading, the weight trend and recent history. With none recorded yet, **Record Vitals** adds the first.



The Overview tab: the patient on one page.

6. FURTHER DOWN THE OVERVIEW

1. Amber and red flags point out things to check, like no active protocol or a lab value out of range.
2. **Adherence History** shows how well they kept to their protocol, week by week.
3. **Active Medications** lists what they take. If e-prescribing is set up, **Full history** shows what they've been prescribed anywhere, including at other practices.
4. **Upcoming Appointments** and **Recent Activity** show what's next and what happened lately.
5. **Automations**, at the bottom, shows the workflows they're in and what was sent to them.

7. HEALTH PROFILE

1. Cards hold their personal details, care team, contact details, emergency contact and insurance.
2. **Health Profile** holds their goals, conditions and allergies. Below it are their current medications and supplements.
3. **Lifestyle Snapshot** fills in from an intake form or their app. If it's empty, **Send an intake form** asks them for it.
4. Press **Edit Profile** to change anything, then **Save Changes**.
5. **Kiosk Mode** turns the screen over to the patient. They see only the fields still blank, and what they type saves straight to the chart.

Peak Vitality Clinic

Growth Plan

Notifications

9+

Dashboard

HTS

Patients

Care Plan

Intake Engine

5

Consents

Appointments

My Schedule

Labs

Treatment Plans

Clinical Notes

ACOLS

Protocols

E-Prescriptions

Refills

Dr. Alex Rivera

Owner / Director

Personal Details

Full Name

Otis Walker

Date of Birth

November 25, 1995 (Age 30)

Sex

Male

Blood Type

B+

Height

6'0"

Weight

174 lbs updated Jun 23, 2026

BMI

24.5 - Normal

Marital Status

—

Employment

—

Care Team

Assigned Doctor

Dr. Maya Chen

Role

Weight Management & Metabolic

Pref. Pharmacy

Olympia Pharmacy

Referral Source

Instagram

Contact Information

Email

otis.walker@demo.peakvitality.example

Phone

250-555-0650

Phone Type

—

Address

Chicago, IL

Member Since

July 31, 2026

Emergency Contact

Name

Matthew Walker (family)

Relationship

Parent

Phone

312-555-0014

Insurance & Coverage

Payer

—

Member ID

—

Group ID

—

Coverage

Check coverage

Health Profile: personal details, care team, contact info and insurance.

8. PROBLEMS

The **Problem List** shows their active and resolved problems. Press **Add problem** to add one.

Their allergies show at the top so nobody misses them. You change allergies on the Health Profile tab.

9. PROTOCOL

1. **Recommended plan** is what you've suggested and what the patient did with it. **Recommend** adds a new one. **Follow-up queue** opens everyone's follow-ups.
2. **In-clinic administrations** lists injections given here. **Log injection** records one, and **Print record** prints the log.
3. **Patient check-ins** shows what the patient logged themselves, kept apart from what your team records.
4. Below are the treatment plans they're on, phase by phase. **Assign Protocol** puts them on one.

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Owner / Director

Recommended plan

What was suggested, what the patient did with it, and who follows up.

Follow-up queue + Recommend

Nothing recommended yet

Put a plan together and the patient sees it in their app, with prices.

+ Recommend

ALLERGIES - 1

Sulfa drugs

IN-CLINIC ADMINISTRATIONS

Print record + Log injection

IN CLINIC 11

AT HOME 0

LAST 30 DAYS 0

AVG INTERVAL 14.3d

LAST DOSE 120mg

Weight 174.1 → 174 lb (-0.1 lb) since Apr 7, 2026 · 7 weigh-ins

DATE	WHERE	MEDICATION	DOSE	WEIGHT	ROUTE / SITE	LOT	BY
Jul 26, 26	In clinic	Testosterone Cypionate 200mg/mL	120mg	—	IM · Glute R	TC-2501B	Dana Reyes, NP
Jul 18, 26	In clinic	Testosterone Cypionate 200mg/mL	100mg	—	IM · Vastus lat. L	TC-2501B	Rachel Bailey, RN
Jul 12, 26	In clinic	Testosterone Cypionate 200mg/mL	100mg	—	IM · Vastus lat. R	TC-2501B	Dana Reyes, NP
Jul 5, 26	In clinic	Testosterone Cypionate 200mg/mL	100mg	—	IM · Glute R	TC-2501B	Rachel Bailey, RN

Note Patient reported mild soreness at prior site.

Show all 11 doses (7 more)

Protocol: what you recommend, injections given, and the plan they're on.

10. LABS

- Each lab panel shows the date it was drawn, its status, and how many values are flagged as out of range.
- Book from here** books a **Lab draw** or a **Follow-up visit** without leaving the chart.
- Targets for this patient** sets goal ranges just for them.
- Full lab history** opens the Labs page.

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Lab Results

Full lab history >

Book from here

Schedule the next draw or a visit to go over results — without leaving the chart.

Lab draw

Follow-up visit

Targets for this patient

+ Add target

Your goal for this patient, shown to them as "Your target" beside the laboratory's range once a result is released. It replaces the clinic's target for the same marker and unit. It never changes a result's flag or what counts as critical, and it applies only to results in exactly the same unit.

No targets set for this patient. The clinic's targets apply where there are any.

Testosterone Total + Free

Drawn 2026-05-16

3 flagged

Released to patient

Total Testosterone

292 ng/dL

300-1000 ng/dL

Low

Free Testosterone

2.8 pg/mL

9-30 pg/mL

Low

SHBG

44 nmol/L

18-54 nmol/L

Normal

Estradiol

34 pg/mL

10-40 pg/mL

Normal

LH

3.1 mIU/mL

1.7-8.6 mIU/mL

Normal

FSH

11.4 mIU/mL

1.5-12.4 mIU/mL

Normal

DHEA-S

118 ug/dL

100-430 ug/dL

Normal

Cortisol (AM)

13 ug/dL

6-18 ug/dL

Normal

IGF-1

0 ng/mL

90-260 ng/mL

Low

Testosterone Total + Free

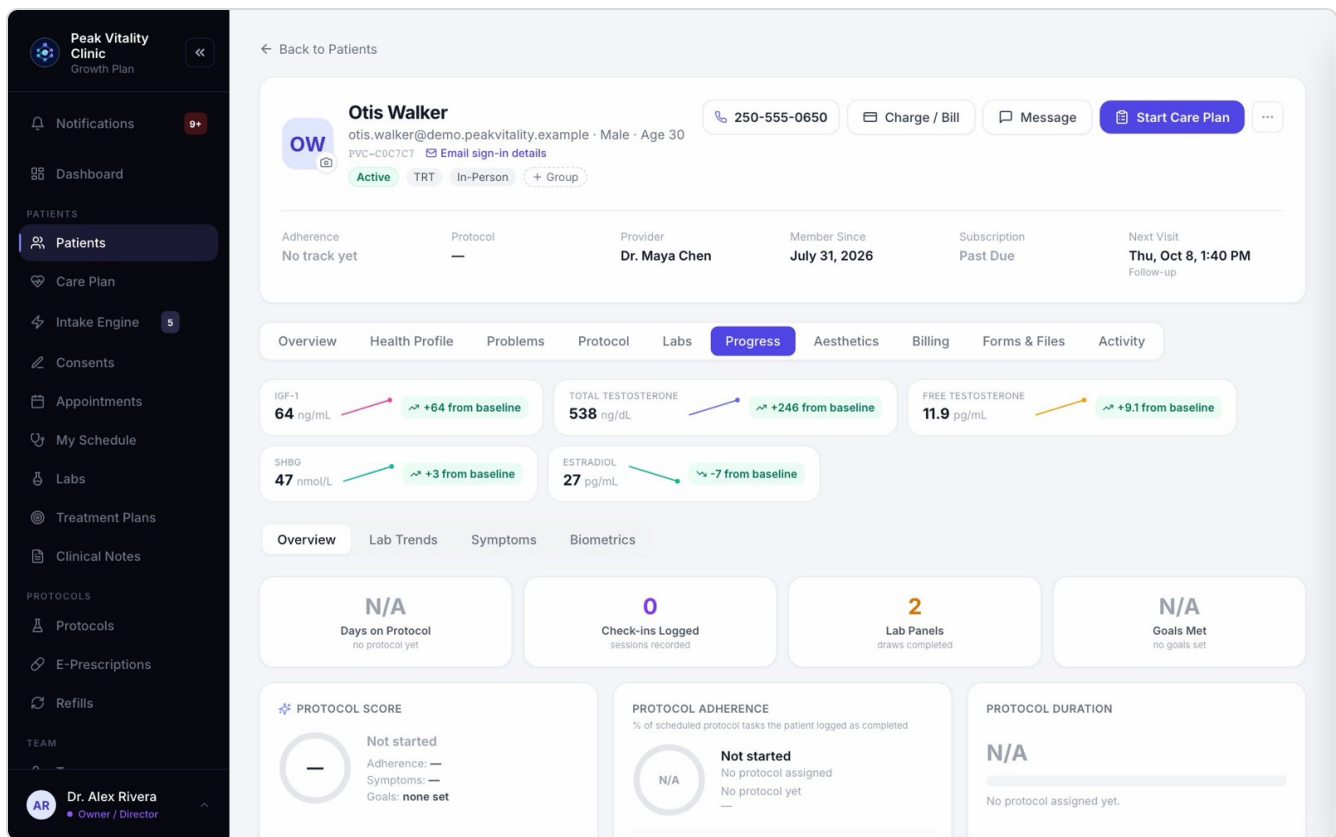
3 flagged

Released to patient

Labs: results with flags, and booking the next draw.

11. PROGRESS

Progress shows whether their protocol is working, from the day it started. Switch between **Overview**, **Lab Trends**, **Symptoms** and **Biometrics**.



Progress: labs, symptoms and biometrics over time.

12. AESTHETICS

For injectables and other aesthetic work. **Injection mapping** records where each product went on the face. **Photos** holds before-and-after pictures, **History** their past sessions, and **Safety** their safety screening and any reactions.

13. BILLING

Four boxes show what they owe (**Outstanding**), **Paid to date**, their **Credit balance** and their **Subscriptions**. Below is their **Transaction history**, newest first.

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Dr. Alex Rivera
Owner / Director

Overview Health Profile Problems Protocol Labs Progress Aesthetics **Billing** Forms & Files Activity

OUTSTANDING \$0.00
PAID TO DATE \$0.00
CREDIT BALANCE \$0.00
+ 1 visit credit
SUBSCRIPTIONS 0 active

CARDS ON FILE
+ Add a card on file
Recorded for reference only — No processor connected does not store cards for us, so nothing here can be auto-charged.

Transaction history 7
All Payments Invoices Subscriptions Credits

Payment failed failed card	Jul 24, 2026 · card · Card declined	\$299.00
Included visits Available	Jul 7, 2026 · 1 of 3 remaining	—
Payment succeeded card	Jun 24, 2026 · card · Subscription charge	\$299.00
Payment succeeded card	May 24, 2026 · card · Subscription charge	\$299.00
Payment succeeded card	Apr 24, 2026 · card · Subscription charge	\$299.00
Payment succeeded card	Mar 24, 2026 · card · Subscription charge	\$299.00
Subscription started Started	Mar 5, 2026 · Subscription · monthly	\$299.00

Billing: what they owe, what they've paid, and every payment.

14. FORMS & FILES

1. **Send forms** asks them to fill in or sign a form.
2. **Upload** adds a file, like an ID, an insurance card or a scan.
3. The search box looks through this patient's files, notes, labs and more.
4. Signed forms, forms waiting for their signature, and forms waiting for yours are listed apart. You sign yours on the Consents page.
5. Under **Records request**, pick **From** and **To**, then press **Download records (.zip)** to download the chart's records for those dates. Each download is logged.

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Send forms

Clinical notes

1 · 0 provider-only

+ New note

Open notes >

Provider-only hides a note from the patient, not from your team.

Lab Review

Locked

Signed

Aug 5, 2026 · Dr. Maya Chen

Patient can see

VISIT RECORDINGS

No visit recordings are kept for this patient.

RECORDS REQUEST

FROM

TO

mm/dd/yyyy

mm/dd/yyyy

Download records (.zip)

Everything in the period, last day included, with an index. Each download is logged.

SIGNED FORMS 3

✓

Peptide Therapy Consent

Signed Jan 18, 2026

✓

GLP-1 Weight Management Consent

Signed Jun 5, 2026

✓

Telehealth Consent

Signed Jun 5, 2026

AWAITING SIGNATURE 1

⌚

TRT Informed Consent

Not signed yet

Sign now in person

Search this patient's files, notes, labs and more...

+ Upload

All 0

Identification

Intake Form

Signed Consent

Provider Form

Lab Result

Imaging

Insurance Card

Referral

Correspondence

Other

Add a type...

Forms & Files: signed forms, uploads, and sending a form.

15. ACTIVITY

Their appointment history, their call log, and an **Activity Timeline** of the ten latest things that happened, grouped by day.

Audit Trail opens the audit log for this patient.

Appointments

My Schedule

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Dr. Alex Rivera

Owner / Director

Tue, Aug 11

11:00 AM

Injection visit

Dr. Alex Rivera · 15 min

Completed

Sat, Aug 1

8:00 AM

Injection visit

Dana Reyes, NP · 15 min

Completed

Activity Timeline

Audit Trail

TUE, SEP 15

🔄

Refill requested

Sep 15 · 9:40 AM

SUN, AUG 9

📄

Lab results ready — Testosterone Total + Free

Aug 9 · 12:03 PM

MON, JUN 22

📄

Lab results ready — Testosterone Total + Free

Jun 22 · 4:53 PM

Activity: calls and a timeline of what happened lately.