

Getting your patients into the portal and app

What a patient needs to get in the first time, how to send it, a handout you can print, the steps they follow, and what to do when it doesn't work.

Setup guide · For Owners, Managers, Front desk · aminova.health/university/patient-sign-in

1. WHAT A PATIENT NEEDS

A patient does not get a password from you. The first time, they **activate** their account and create their own. For that they need four things:

1. Your **clinic code**. It's the same for every patient. Find it in **Settings** → **Patient Portal**, under **Patient Access Code**.
2. Their own **User ID: AMN-** and four digits, like AMN-4821. It's on their chart.
3. Their **date of birth**. It must match the date of birth on their chart exactly.
4. Their **email**. When the chart has one, the last step sends a 6-digit code there. A wrong email means a code they never see.

Tip. Before you hand anything out, check the date of birth and the email on the chart with the patient. Those two cause most first-time problems.

2. FIND THE PATIENT'S USER ID

1. Open the patient's chart. Their User ID is just under their name and email, in grey.
2. If it says **No portal ID yet**, the chart is missing something. The amber note under it says what: usually a **date of birth**, or a **phone number or email**. Add it and save, and the User ID is issued on its own.

Tip. Patients can type only the four digits, or leave out the dash. Both still work.

3. SEND THEM THEIR SIGN-IN DETAILS

Some patients get the email on their own: when they book through your public booking link, when they pay a signup bill, and when an intake form converts them and **Send a welcome email** is on. That switch is in **Intake Engine** → **Form Builder**, under **When converted to a patient**.

A patient you add by hand gets nothing until you send it.

1. From the chart: press **Email sign-in details** next to their User ID. It sends your clinic code, their User ID and the first-time steps. After that it says **Send again**.
2. Right after you add a patient: the card shows their **Activation details**. Press **Copy activation details** to paste them into a text, or the **Email sign-in details** button under it.
3. For many patients at once: go to **Patients**, press **Select**, tick them, and press **Email sign-in details**.

Tip. Whatever the button says is what happened. **Sent to** an address means it went. Anything else tells you why it didn't.

4. PRINT THE SIGN-IN HANDOUT

1. For one patient: on their chart, press **Print sign-in handout** next to their User ID. Their User ID is filled in.
2. For a stack at the front desk: go to **Settings → Patient Portal** and press **Print sign-in handout** under your access code. It leaves a line to write each User ID on.
3. The sheet has your clinic code, the link with a code to scan, the steps, and what to do if something goes wrong. Press **Print / Save as PDF**.
4. To send it instead, press **Copy as text** and paste it into an email or a text message.

5. WHO CAN SEND THE DETAILS

1. **Email sign-in details** and **Print sign-in handout** need full patient record access. By default the Owner, Manager, Physician and Nurse roles have it; MA, Front desk and Billing don't.
2. If you don't see the buttons, ask someone with that access to send them.
3. Sending to everyone from **Patients → Select → Email sign-in details** skips patients who have already activated.

6. WHAT THE PATIENT DOES THE FIRST TIME

1. They open the link or the app. If it asks for a **Clinic code**, they type yours and press **Continue**.
2. They press **First time? Activate your account**, under the blue button.
3. They type their **User ID** and **Date of birth**, create a password, and press **Activate account**.
4. They check their email for a 6-digit code, type it in, and press **Verify & activate**. They're in.
5. From then on they sign in with their **User ID** and password. **Remember me on this device** saves typing the User ID.

Tip. If the chart has no email, there is no code step. Their date of birth is enough.

7. THE APP OR THE WEB PORTAL

Patients don't need an app. The portal works in any browser, on a phone or a computer, at **app.aminova.health/portal**.

The link on the handout ends in your clinic code, like **app.aminova.health/portal?clinic=YOURCODE**. It opens straight on your clinic, so the patient skips the clinic code step.

The app is optional. If your clinic has its own app, it opens straight on your clinic too. Otherwise patients can use the Aminova app and type your clinic code once. The sign-in email has the store buttons for whichever app is yours.

8. THEY TRIED TO SIGN IN INSTEAD OF ACTIVATING

This is the most common problem. A patient types the clinic code and User ID on **Welcome back**, and there is a password box they have nothing to put in.

They need **First time? Activate your account**. The screen now points them there when they press **Continue** with no password. After a failed sign-in, it switches to activation on its own.

9. “WE COULDN’T VERIFY THOSE DETAILS”

The clinic code, the User ID or the date of birth doesn’t match. For safety, the screen never says which one.

1. Read the clinic code and User ID back to the patient from the chart.
2. Check the **Date of birth** on the chart with them. A typo in the year is common, and so is a date that came across wrong from an old system. Fix it on the chart and save.
3. They try again. On a phone, the date box opens a date picker: they should check the year it lands on.

10. THE 6-DIGIT CODE NEVER ARRIVES

1. Ask them to check their spam or junk folder.
2. The screen shows where it was sent, like j●●●@gmail.com. If that’s not their email, fix the email on the chart and save. They start again from **First time? Activate your account**.
3. A code lasts 10 minutes and allows five tries. They press **Send a new code**, under the code box, for another one.

11. YOUR CLINIC IS STILL IN PLAYGROUND

While your clinic is in **Playground Mode**, nothing is emailed to patients. **Email sign-in details** says **Not sent: your clinic is still in setup**, never “sent”.

Give the details by hand or on the printed handout. The 6-digit code for activation still sends in Playground, so a test patient can activate.

Going live with **Ready to go live?** turns patient email on. It doesn’t resend what was held, so send sign-in details again after you go live.

12. THE PATIENT IS WAITING ON A SIGNUP PAYMENT

With **Require payment before portal access** on, in **Settings → Payments & Plans**, a new patient gets a payment link instead of sign-in details.

They have no User ID until they pay. When the payment clears, the sign-in email goes out on its own. Until then, **Email sign-in details** won’t send, and says why.

13. LOCKED OUT, OR THEY FORGOT THEIR PASSWORD

1. **Too many failed attempts**: they wait out the time on the screen. You choose the limits in **Settings → Security**, under **Lock After N Failures** and **Lockout Duration**.
2. **This account is already activated**: they already have a password. They press **Already activated? Sign in**.
3. **This portal account is no longer active**: the patient is discharged, transferred or archived. If they’re back in your care, press **Reactivate** on the banner on their chart.
4. **Forgot their password**: there is no reset in the app yet, for the patient or for your team. Contact Aminova support with their User ID. If they turned on **Sign in with Face ID** on their phone, that still gets them in.

Tip. Avoid **Until admin unlocks** under **Lockout Duration** for now: there is no unlock button on any screen yet, so a patient locked that way can't be let back in from Aminova. Pick a number of minutes instead.

14. THEY TYPED THE WRONG PASSWORD AND IT ASKS FOR A DATE OF BIRTH

1. Any failed sign-in shows the same message, “We couldn’t sign you in...”, and switches the screen to **Activate your account**. That happens for a wrong password too.
2. If the patient has activated before, activating again ends in “This account is already activated — please log in instead.” They press **Already activated? Sign in** and try their password again.
3. If they really don’t remember it, see **Forgot their password** above.