

Patients

Every patient in your clinic. Find anyone, sort and filter the list, add a new patient, put patients in groups, and open a chart.

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

1. THE PAGE AT A GLANCE

At the top is how many patients you have, with **Add Patient** and a ... menu on the right. Under that are the search box, **Filters** and **Select**. The list of patients fills the rest.

If your role can't see full charts, the page says **Demographics view** and each row shows only the phone, status and next appointment.

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Growth Plan

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PATIENTS

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PROTOCOLS

Protocols

E-Prescriptions

Refills

TEAM

Dr. Alex Rivera
Owner / Director

Patients
103 total

2 need details · show

Search by name, email, or chart number...

Filters Select

PATIENT	NEXT VISIT	LAST VISIT	PROTOCOL / PLAN	STATUS	BALANCE DUE
WH Willa Hill PVC-836985 Age 59 · willa.hill@demo.peakvitality.example	None booked	Jul 28 Walk-in	—	Onboarding	—
MF Marguerite Fenwicke Practice patient AMB-431187 Age 47 · marguerite.fenwicke@example.invalid	None booked	—	—	Active	—
NT Nancy Torres PVC-A3F390 Age 48 · nancy.torres@demo.peakvitality.example	None booked	Jul 18 Walk-in	—	Onboarding	—
SN Silas Nguyen PVC-283802 Age 31 · silas.nguyen@demo.peakvitality.example	None booked	Jul 23 Walk-in	—	Onboarding	—
VS Victor Scott PVC-3EF815 Age 65 · victor.scott@demo.peakvitality.example	None booked	Jul 16 Walk-in	—	Onboarding	—
RF Rhett Flores PVC-70EFD9 Age 42 · rhett.flores@demo.peakvitality.example	None booked	Aug 13	—	Onboarding	—
MA Michael Anderson PVC-9778D5 Age 62 · michael.anderson@demo.peakvitality.example	Oct 1 injection-visit	Sep 18	TRT Optimization · Week 11	Inactive	—
JH Jolene Harris PVC-32B890 Age 52 · jolene.harris@demo.peakvitality.example	Oct 1 wrinkle-relaxer-tox	Sep 24	Semaglutide Weight Management · Week 11 Optimize — Monthly	Inactive	—
SR Sabine Ramirez PVC-3C59DC Age 46 ·	Sep 29 injection-visit	Sep 22	Tirzepatide Weight Loss · Week	Active	—

The Patients page.

2. FIND A PATIENT

1. Type in the search box: a name, email, chart number or portal ID.
2. It searches every patient in the clinic, not just the page you're on.
3. Press the × in the box to clear it.

Patients						
👤 103 total						
2 need details · show		🔍 Search by name, email, or chart number...		🔽 Filters	Select	
PATIENT	NEXT VISIT		LAST VISIT	PROTOCOL / PLAN	STATUS	BA DU
WH Willa Hill PVC-E36985 Age 59 · willa.hill@demo.peakvitality.example	None booked		Jul 28 Walk-in	—	Onboarding	—
MF Marguerite Fenwicke Practice patient AMN-4311B7 Age 47 · marguerite.fenwicke@example.invalid	None booked		—	—	Active	—
NT Nancy Torres PVC-A3F390 Age 48 · nancy.torres@demo.peakvitality.example	None booked		Jul 18 Walk-in	—	Onboarding	—
SN Silas Nguyen PVC-283802 Age 31 · silas.nguyen@demo.peakvitality.example	None booked		Jul 23 Walk-in	—	Onboarding	—

Search looks through every patient, not just this page.

3. THE LIST

1. Each row shows the patient, their **Next visit**, **Last visit**, **Protocol / plan** and **Status**. People who can see money also get **Balance due**.
2. Beside the name is their portal ID, which they use to sign in to the patient app. **No portal ID yet** means they don't have one yet. Under the name are their chart number, age and email.
3. A cake icon means it's their birthday today.
4. Hover a row for shortcuts to Messages and Appointments.
5. Click a row to open the chart. The list shows 50 at a time; use **Prev** and **Next** for more.

Peak Vitality Clinic Growth Plan		PATIENT	NEXT VISIT	LAST VISIT	PROTOCOL / PLAN	STATUS	BALANCE DUE
Peak Vitality Clinic Growth Plan Notifications 9+ Dashboard HTS Patients Care Plan Intake Engine 5 Consents Appointments My Schedule Labs Treatment Plans Clinical Notes COLS Protocols E-Prescriptions Refills Dr. Alex Rivera Owner / Director	WH Willa Hill PVC-E36985 Age 59 · willa.hill@demo.peakvitality.example	None booked	Jul 28	Walk-in	—	Onboarding	—
		MF Marguerite Fenwicke Practice patient AMN-4311B7 Age 47 · marguerite.fenwicke@example.invalid	None booked	—	—	Active	—
		NT Nancy Torres PVC-A3F390 Age 48 · nancy.torres@demo.peakvitality.example	None booked	Jul 18	Walk-in	Onboarding	—
		SN Silas Nguyen PVC-283802 Age 31 · silas.nguyen@demo.peakvitality.example	None booked	Jul 23	Walk-in	Onboarding	—
		VS Victor Scott PVC-3EF815 Age 65 · victor.scott@demo.peakvitality.example	None booked	Jul 16	Walk-in	Onboarding	—
		RF Rhett Flores PVC-70EFDF Age 42 · rhett.flores@demo.peakvitality.example	None booked	Aug 13	—	Onboarding	—
		MA Michael Anderson PVC-977BD5 Age 62 · michael.anderson@demo.peakvitality.example	Oct 1 injection-visit	Sep 18	TRT Optimization · Week 11	Inactive	—
		JH Jolene Harris PVC-32BB90 Age 52 · jolene.harris@demo.peakvitality.example	Oct 1 wrinkle-relaxer-tox	Sep 24	Semaglutide Weight Management · Week 11 Optimize — Monthly	Inactive	—
		SR Sabine Ramirez PVC-3C59DC Age 46 · sabine.ramirez@demo.peakvitality.example	Sep 29 injection-visit	Sep 22	Tirzepatide Weight Loss · Week 4	Active	—
		OW Otis Walker PVC-C0C7C7 Age 30 · otis.walker@demo.peakvitality.example	Oct 8 follow-up	Sep 18	Sermorelin GH Therapy · Week 10 Optimize — Monthly · past due	Active	—
	... Matthew Walker PVC-D3D944	Oct 6			BPC-157 Recovery		

Click any row to open that patient's chart.

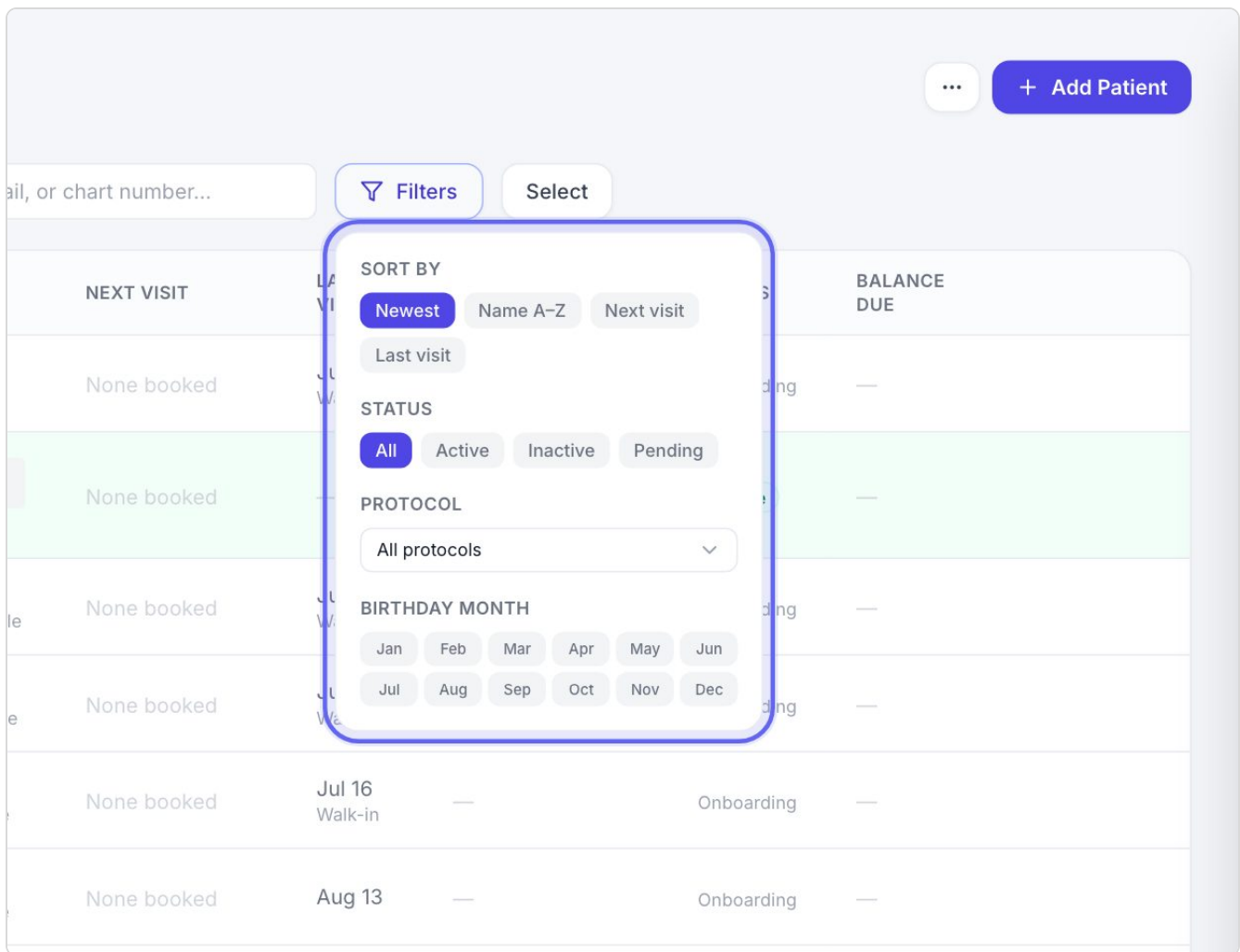
4. THE PRACTICE PATIENT

A green row with a **Practice patient** badge is not a real person. It's there so you and your team can try things safely: open the chart, book a visit, write a note.

A practice patient never gets emails, texts or bills.

5. SORT AND FILTER

1. Click **Filters**.
2. Under **Sort By**, pick **Newest**, **Name A–Z**, **Next visit** or **Last visit**.
3. Narrow the list by **Status**, **Protocol** or **Birthday Month**. Each filter shows as a chip you can clear with its ✕, or press **Clear all filters**.
4. Filters work on the page you're looking at. To find someone on another page, use search.
5. Your filters stay put while you open charts and come back.



Filters: sort the list, or narrow it by status, protocol or birthday month.

6. CHARTS THAT NEED DETAILS

Patients brought over from an old system sometimes arrive without a date of birth, or without a phone or email. When that happens, an amber button says how many **need details**. Click it to see only those patients.

Each of those rows says what is missing. Open the chart, add it, and save. The patient's portal ID is issued on its own.

7. ADD A PATIENT

1. Click **Add Patient**.
2. Fill in the fields marked with a star: **First Name, Email, Date of Birth**, and the street address, city, state and ZIP.
3. For a patient under 18, add a guardian's name and a phone or email for them.
4. Add anything else you have, like phone, insurance, allergies or a provider. The patient can fill in the rest in their app.
5. Press **Create Patient**. If they might already be in your clinic, you're asked first: **Open existing chart** or **Create anyway**.

Peak Vitality Clinic
Growth Plan

Patients
103 total

Add New Patient
Enter whatever you have — the patient fills the rest in the app.

First Name * Jane
Last Name Smith
Email * jane@example.com
Phone (555) 000-0000
Date of Birth * mm/dd/yyyy
Sex Select...
Blood Type —
Status Inactive
SHIPPING ADDRESS — prescriptions ship here
Street address * 123 Main St
Apt / Suite Apt 4B
City * Austin
State * Select...
ZIP * 78701
INSURANCE & PHARMACY
Insurance provider Blue Cross Blue Shield
Member / policy # XJZ123456789
Preferred pharmacy CVS — 5th & Main, or compounding pharmacy
SOURCE
How did they hear about us?
Cancel Create Patient

PATIENT	STATUS	BALANCE DUE
WH Willa H Age 55	Onboarding	—
MF Margu Fenwic Age 47	Active	—
NT Nancy Age 48	Onboarding	—
SN Silas H Age 31	Onboarding	—
VS Victor Age 65	Onboarding	—
RF Rhett Age 42	Onboarding	—
MA Michael Age 62	Inactive	—
JH Jolene Age 52	Inactive	—
SR Sabine Ramirez Age 46	Active	—

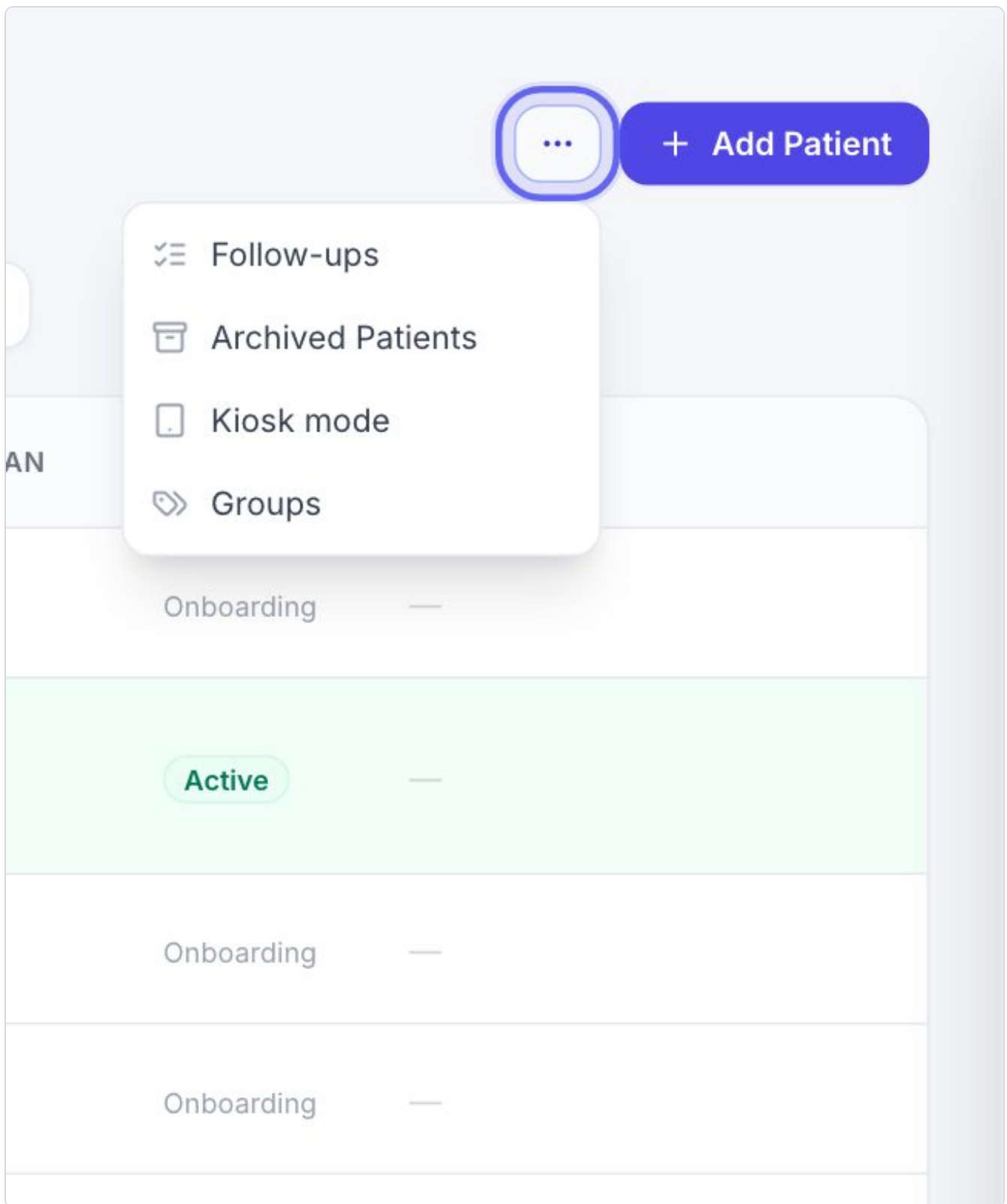
Add New Patient. Starred fields are the only ones you need.

8. AFTER YOU ADD ONE

1. You see their **Activation details**: your **Clinic code** and their **User ID**.
2. They open the patient app, choose to activate their account, and enter both with their date of birth.
3. Press **Copy activation details** to paste them to the patient, or use the email button under them to send them by email.
4. If your clinic asks new patients to pay first, a payment link is emailed instead. Their app account opens once they pay.
5. Press **Open chart** to go to their chart.

9. THE ... MENU

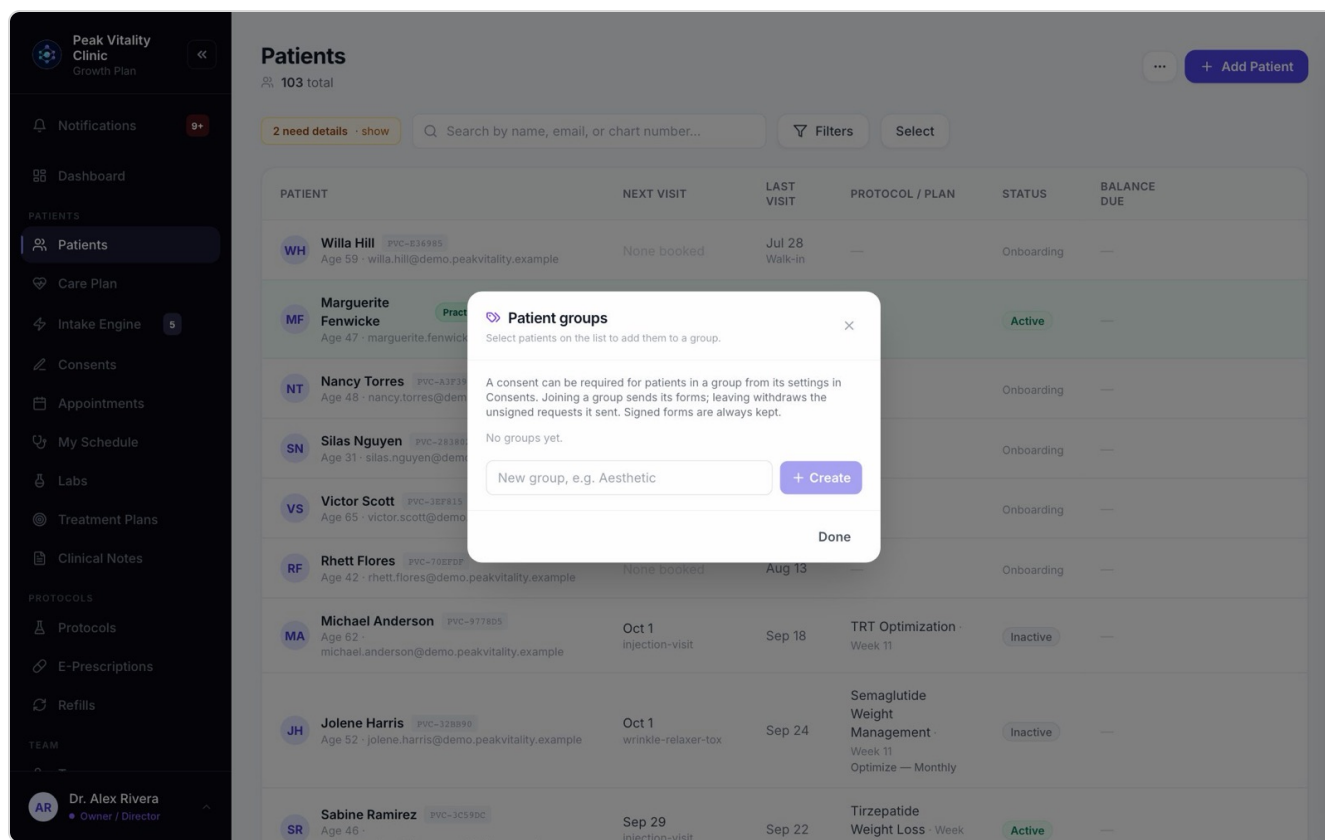
1. **Follow-ups** opens the follow-up queue for recommended plans.
2. **Archived Patients** lists patients you've archived. Click one to open their chart.
3. **Kiosk mode** opens a full-screen tablet screen in a new tab, where patients fill in forms and sign consents themselves.
4. **Groups** opens your patient groups.



The ... menu beside Add Patient.

10. PATIENT GROUPS

1. A group is a set of patients, like everyone on one program. Owners and managers create, rename and delete them.
2. To make one, open **Groups** from the ... menu, type a name in the box at the bottom, and press **Create**.
3. You choose which consents a group needs on the Consents page. Joining a group sends them. Leaving it takes back any it sent that weren't signed. Signed forms are always kept.
4. Once you have groups, an **All groups** menu appears beside the search box. Pick a group to see only its patients.



The Patient groups window, where owners and managers make groups.

11. ACT ON MANY PATIENTS AT ONCE

1. Press **Select**. A tick box appears on every row.
2. Tick the patients you want. The tick box at the top ticks the whole page.
3. Press **Add to a group or remove** to put them in a group, or take them out.
4. Press **Email sign-in details** to send each one their portal ID, your clinic code and the steps to set a password. Send to the ones you ticked, or to everyone. You see how many will get it, and who is left out and why, before anything is sent.
5. Press **Done** when you're finished.

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Dr. Alex Rivera
Owner / Director

Patients

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2 need details - show

Search by name, email, or chart number...

Filters

Done

Tick patients to act on them

Cancel

☐	PATIENT	NEXT VISIT	LAST VISIT	PROTOCOL / PLAN	STATUS	BALANCE DUE
☐	WH Willia Hill PVC-E36995 Age 59 · willia.hill@demo.peakvitality.example	None booked	Jul 28 Walk-in	—	Onboarding	—
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Select mode: tick patients, then act on all of them at once.

Tip. Patients who have already set a password are left out of sign-in emails.