

Protocols

Your treatment programs. Build one step by step, price it, publish it, and see who is on each one and how they are doing.

Page manual · For Owners, Managers, Providers · aminova.health/university/protocols

1. THE PAGE AT A GLANCE

Open **Protocols** in the sidebar. The page is your protocol library: every treatment program your clinic offers, one card each.

Under the title you see how many protocols are active and how many patients are on them. If your role can only look, the page says **View only** and the buttons that change things are hidden.

Peak Vitality Clinic
Growth Plan

Notifications 9+

Dashboard

PATIENTS

- Patients
- Care Plan
- Intake Engine 5
- Consents
- Appointments
- My Schedule
- Labs
- Treatment Plans
- Clinical Notes

PROTOCOLS

- Protocols**
- E-Prescriptions
- Refills

TEAM

Dr. Alex Rivera
Owner / Director

Protocol Library

Browse published treatment protocols, track enrollment, and manage pricing.
8 active protocols · 12 patients enrolled [Live](#)

+ New Protocol

Search protocols...

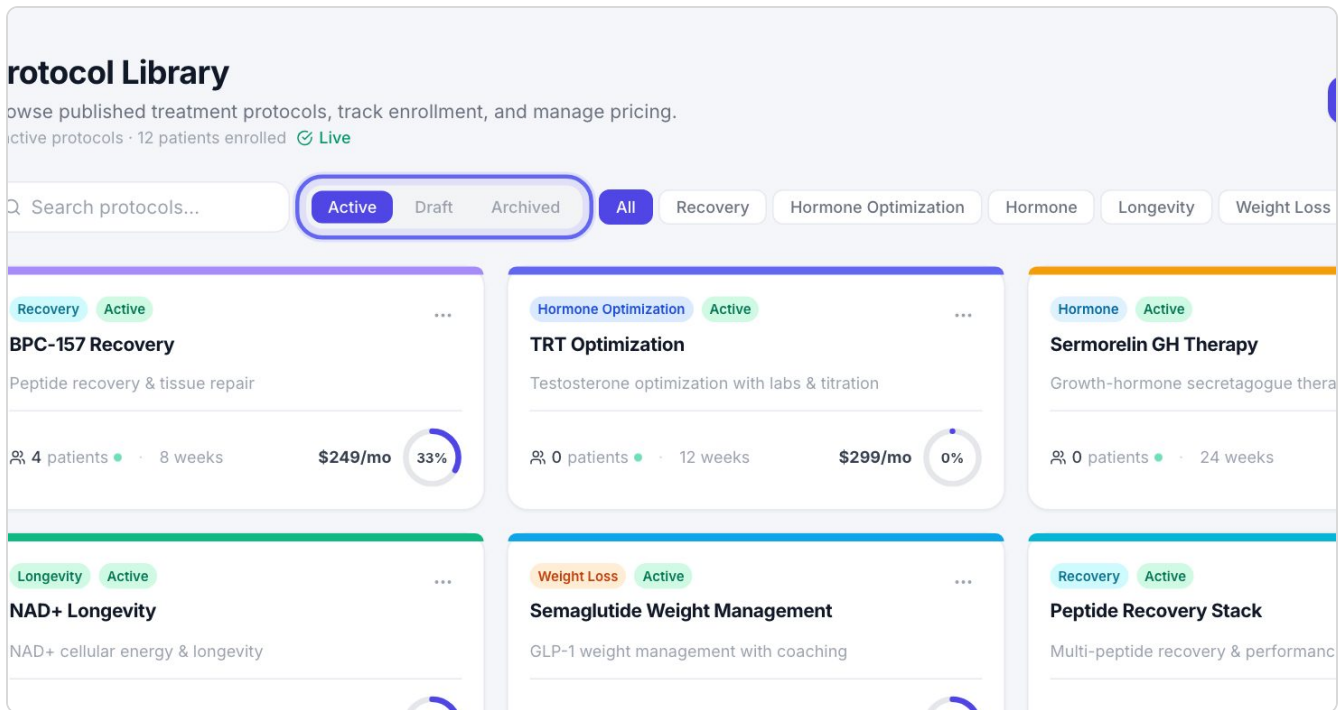
Active Draft Archived All Recovery Hormone Optimization Hormone Longevity Weight Loss

Protocol	Status	Description	Patients	Duration	Price	Enrollment
BPC-157 Recovery	Active	Peptide recovery & tissue repair	4	8 weeks	\$249/mo	33%
TRT Optimization	Active	Testosterone optimization with labs & titration	0	12 weeks	\$299/mo	0%
Sermorelin GH Therapy	Active	Growth-hormone secretagogue therapy	0	24 weeks	\$449/mo	0%
NAD+ Longevity	Active	NAD+ cellular energy & longevity	3	12 weeks	\$349/mo	25%
Semaglutide Weight Management	Active	GLP-1 weight management with coaching	2	16 weeks	\$399/mo	17%
Peptide Recovery Stack	Active	Multi-peptide recovery & performance protocol	1	10 weeks	\$349/mo	8%
Tirzepatide Weight Loss	Active	Dual GIP/GLP-1 weight management with coaching	0	16 weeks	\$499/mo	0%
Thyroid Optimization	Active	T3/T4 thyroid hormone optimization	2	12 weeks	\$279/mo	17%

The protocol library, showing the active protocols.

2. FIND A PROTOCOL

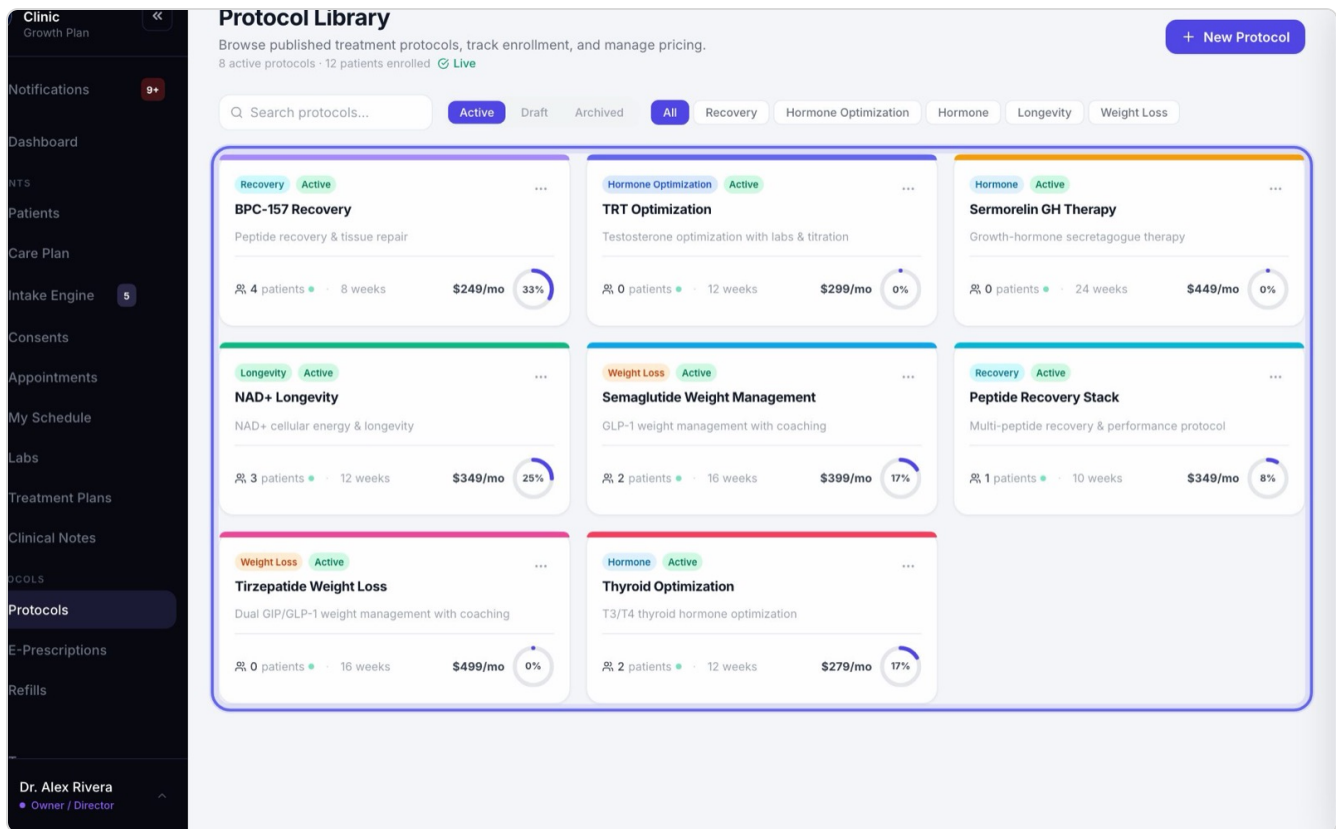
1. Pick **Active**, **Draft** or **Archived**. Active ones are in use. Drafts aren't published yet. Archived ones take no new patients.
2. Click a category button to see only those protocols. **All** shows every category again.
3. Type part of a name in **Search protocols...** to find one fast.



Status, category and search, above the cards.

3. THE PROTOCOL CARDS

1. Each card shows the category, the status and the name, with a short description.
2. Along the bottom: how many patients are on it, how long it runs, and its monthly price if you set one.
3. The ring shows what share of all your patients on protocols are on this one.
4. Click a card to open it.



One card per protocol, colored by the protocol's own color.

4. BUILD A NEW PROTOCOL

1. Click **New Protocol**. The builder opens with six steps across the top.
2. Move with **Next** and **Back**, or click any step to jump to it.
3. Press **Save draft** any time to keep your work and finish later. A draft only needs a name.
4. If you close with unsaved changes, you're asked first, so one wrong click can't lose your work.

The protocol builder. Its six steps run across the top.

5. BASICS AND CLINICAL

1. In **Basics**, give it a **Protocol name** and a **Category**. Pick a category from the list, or type your own.
2. Pick a color. It shows on the protocol card and on the patient's plan. Add a short **Description**.
3. In **Clinical**, fill in **Eligibility**, **Contraindications**, **Baseline labs** and **Target outcomes**. Press Enter after each one.
4. If a medicine in this protocol is one of your products, that product's contraindications are offered under the field. Click one to add it.

6. PHASES & DRUGS

1. A phase is a stretch of weeks with its own medicines. Most protocols have one. Set its weeks with the two **Week** boxes.
2. Pick the medicine in the **Compound** column. Your own products come first. Then add the dose, unit, form and frequency.
3. Write the directions for the patient on the line under it. They carry into each patient's plan.
4. Click the small arrow next to the name for **Route**, **Refills** and **DEA Schedule**.
5. Press **Add compound** for another medicine, or **Add a phase** when the dose or drug changes partway through. Drag a phase to reorder it.

Phases & drugs: the weeks, then each medicine with its dose and directions.

7. MONITORING

1. Choose a **Check-in frequency**, or **None**. It prints on the protocol so everyone knows the plan. It doesn't schedule anything by itself.
2. Under **Follow-up labs**, press **Add a timepoint**, like "Week 6", and list the labs for it.
3. Add **Monitoring notes** for anything the care team should watch for.

Tip. To really schedule check-ins for everyone on a protocol, use the Monitoring tab on the published protocol. See "A check-in schedule for everyone" below.

8. SOURCING & PRICE

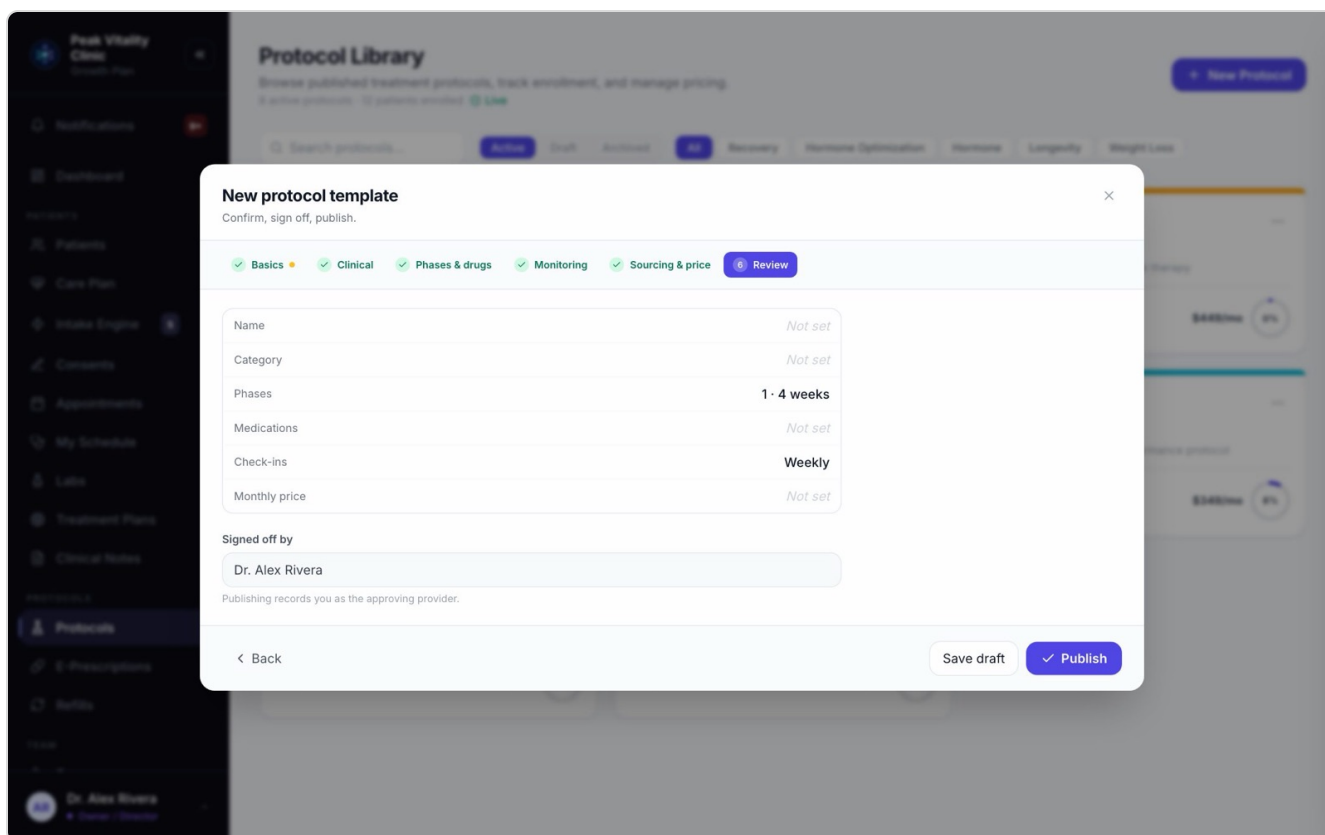
1. This step is optional, and it never bills anyone.
2. Set a **Monthly price**, a **Setup fee** and **Pricing notes**. The monthly price shows on the card, and all of them print on the protocol. The monthly price also fills in when someone starts a subscription from this protocol, and they can change it.
3. Under **Sourcing**, press **Add a sourcing row** to note where a medicine comes from and what it costs you. It works out your margin, for your own planning only.

Sourcing & price: reference prices and your own cost planning.

Tip. Membership plans that patients pay for are set up separately, not here.

9. REVIEW AND PUBLISH

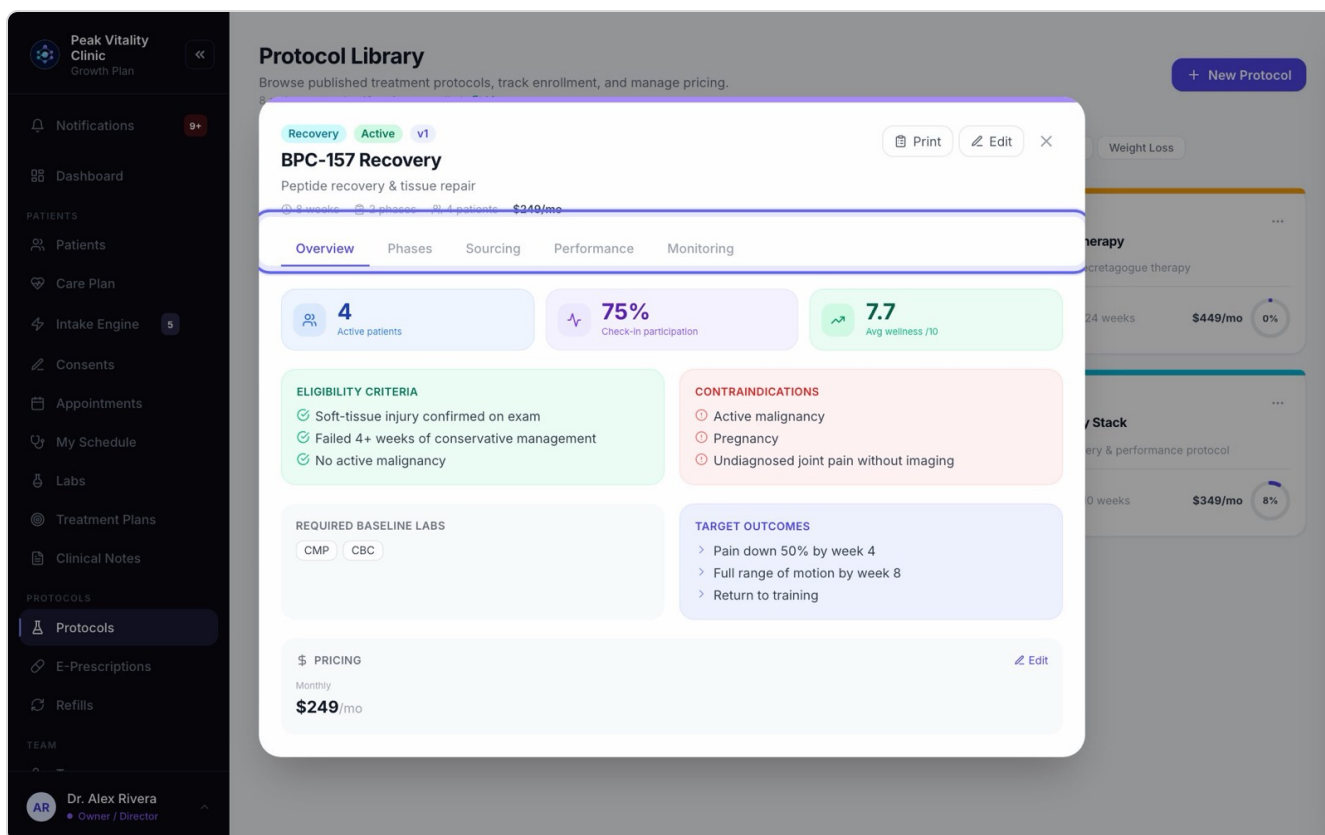
1. Open **Review** to see the name, category, phases, medicines, check-ins and price in one place.
2. **Signed off by** shows your name. Publishing records you as the approving provider.
3. Press **Publish**. If anything is missing, a list called **Fix these before publishing** tells you what. An amber dot on a step also means something there needs a look.
4. To publish, it needs a name, a category, at least one medicine with a dose, directions on any controlled medicine, and phases whose weeks don't overlap. Your own name must be on your account in Team, since it goes on the sign-off.



Review: everything in one place, with your sign-off, before you publish.

10. OPEN A PROTOCOL

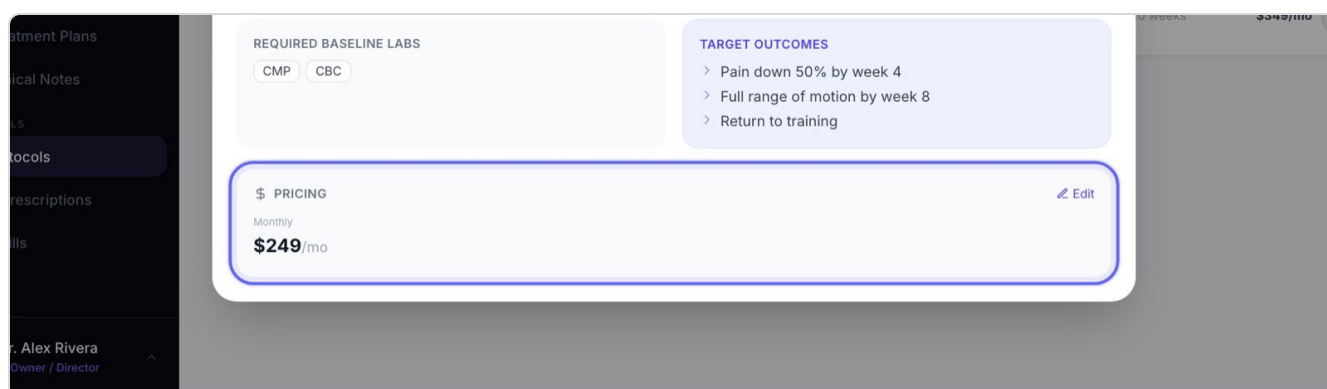
1. Click a card. The protocol opens with five tabs: **Overview**, **Phases**, **Sourcing**, **Performance** and **Monitoring**.
2. **Overview** has who qualifies, who must not, the baseline labs, the goals and the price.
3. **Phases** shows the timeline and each phase's medicines. **Sourcing** shows costs and margin.
4. **Print** makes a PDF of the protocol. **Edit** opens it in the builder.



An open protocol. The tabs hold its phases, costs, patients and check-ins.

11. CHANGE THE PRICE

1. Open the protocol. On **Overview**, find **Pricing**.
2. Click **Edit**. Change the **Setup Fee (\$)**, the **Monthly Price (\$)** or the **Pricing Notes**.
3. Click **Save**. The new price shows on the card right away.

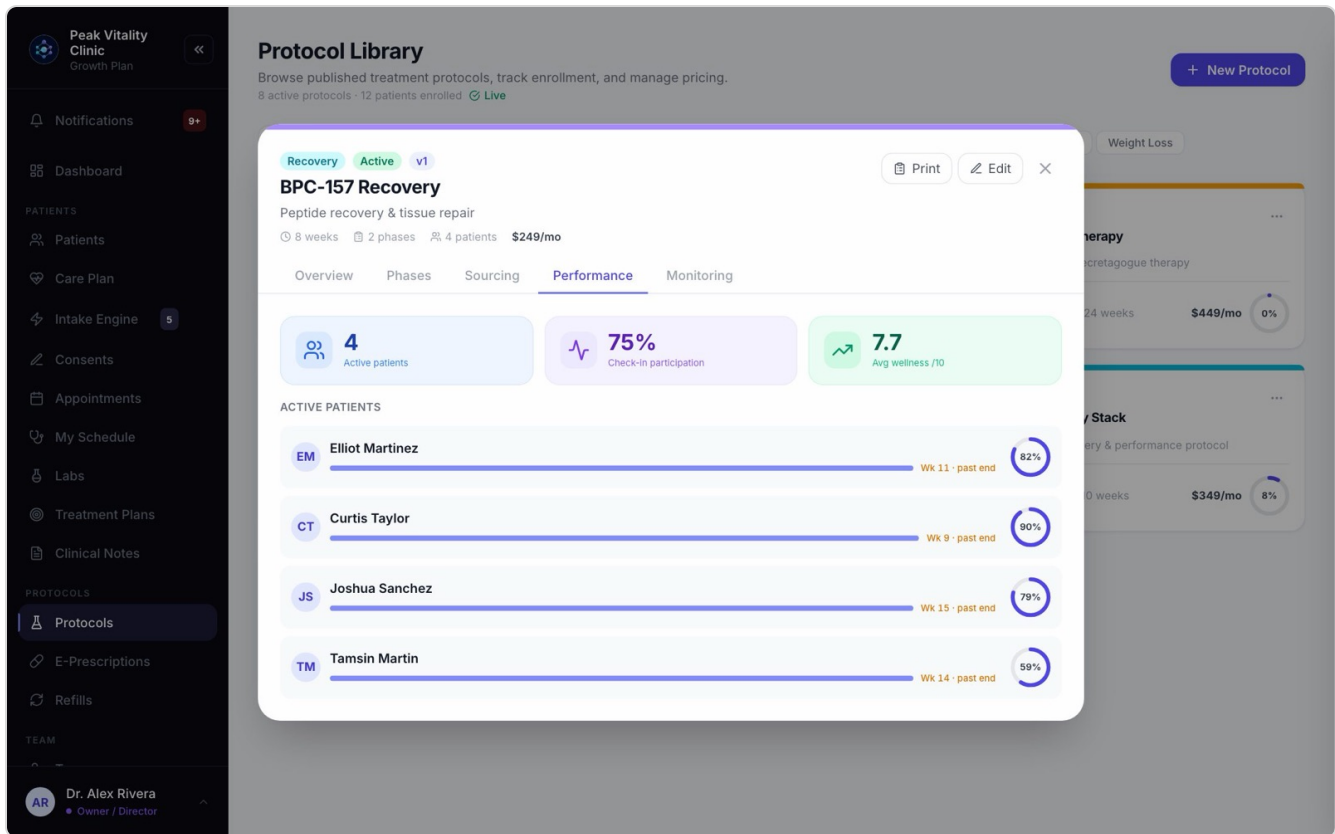


Pricing, on the protocol's Overview tab.

12. WHO IS ON EACH PROTOCOL

1. Open the protocol and click **Performance**.

2. At the top: **Active patients**, **Check-in participation** (the share who sent a check-in in the last 30 days) and **Avg wellness /10** from those check-ins.
3. Below, each patient shows the week they're on. "Past end" means they've gone past the protocol's length. Click a name to open their progress.
4. A patient joins a protocol when you assign it: on their chart's **Protocol** tab, or when you build their care plan from it.

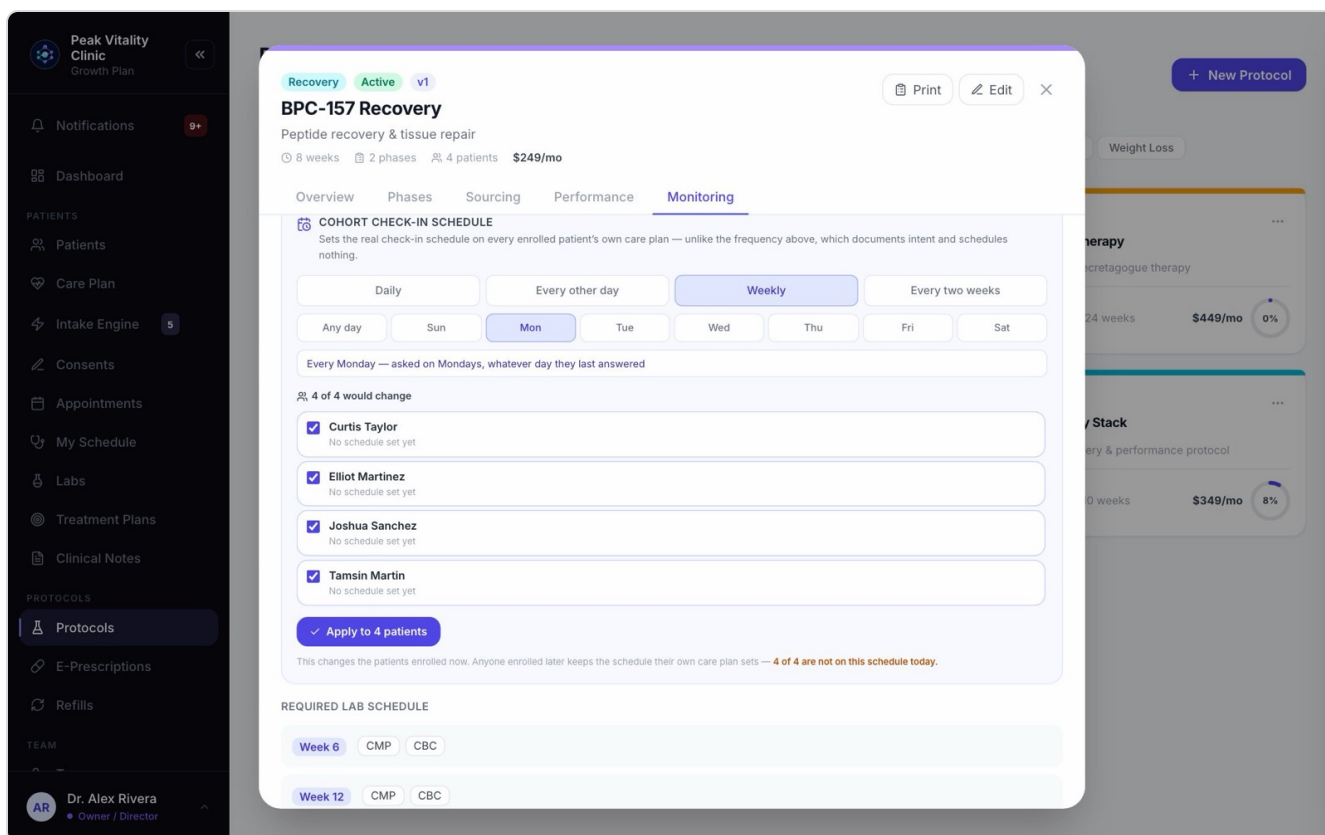


Performance: how many patients are on it, how they're doing, and what week each one is on.

Tip. Patient names only show for roles that can see full patient charts. Everyone else sees the counts.

13. A CHECK-IN SCHEDULE FOR EVERYONE

1. Open the protocol and click **Monitoring**. Find **Cohort check-in schedule**.
2. Pick **Daily**, **Every other day**, **Weekly** or **Every two weeks**. For weekly ones, pick a day or **Any day**.
3. You see each patient and whether they'd change. Untick anyone who should keep their own schedule.
4. Press the apply button. It says how many patients will change, and sets the schedule on each one's own care plan.



The cohort check-in schedule sets one schedule for everyone on the protocol.

Tip. It changes the patients on the protocol now. Someone who joins later keeps their own plan's schedule, so apply it again after you add someone.

14. EDIT, COPY, PUBLISH, ARCHIVE

1. Click ... on a card.
2. **Edit** opens it in the builder. **Duplicate** makes a copy, saved as a draft with "(Copy)" on the name.
3. On a draft, **Review & publish** opens the builder on Review, so every check runs before it goes live.
4. **Archive** stops new patients joining. Patients already on it keep their plan.

ed treatment protocols, track enrollment, and manage pricing.

+ New Pro

12 patients enrolled Live

protocols...

ActiveDraftArchivedAllRecoveryHormone OptimizationHormoneLongevityWeight Loss

ive

overy

ry & tissue repair

8 weeks

...

Edit

Duplicate

Archive

Hormone OptimizationActive

TRT Optimization

Testosterone optimization with labs & titration

0 patients12 weeks\$299/mo0%

HormoneActive

Sermorelin GH Therapy

Growth-hormone secretagogue therapy

0 patients24 weeks\$449/mo

ive

vity

energy & longevity

12 weeks\$349/mo25%

Weight LossActive

Semaglutide Weight Management

GLP-1 weight management with coaching

2 patients16 weeks\$399/mo17%

RecoveryActive

Peptide Recovery Stack

Multi-peptide recovery & performance protocol

1 patients10 weeks\$349/mo

The ... menu on a card: edit, duplicate or archive. A draft's menu also has Review & publish.

Aminova Health LLC — Protocols · Page 11 of 11