For the front desk

Your day at the front desk: the schedule, booking, checking patients in and out, taking payments, getting forms signed, and answering the phone.

Role manual · For Front desk · aminova.health/university/role-front-desk

1. YOUR ROLE

The **Front Desk** role runs the schedule and the counter. You book visits, check patients in and out, take payments, and get forms signed.

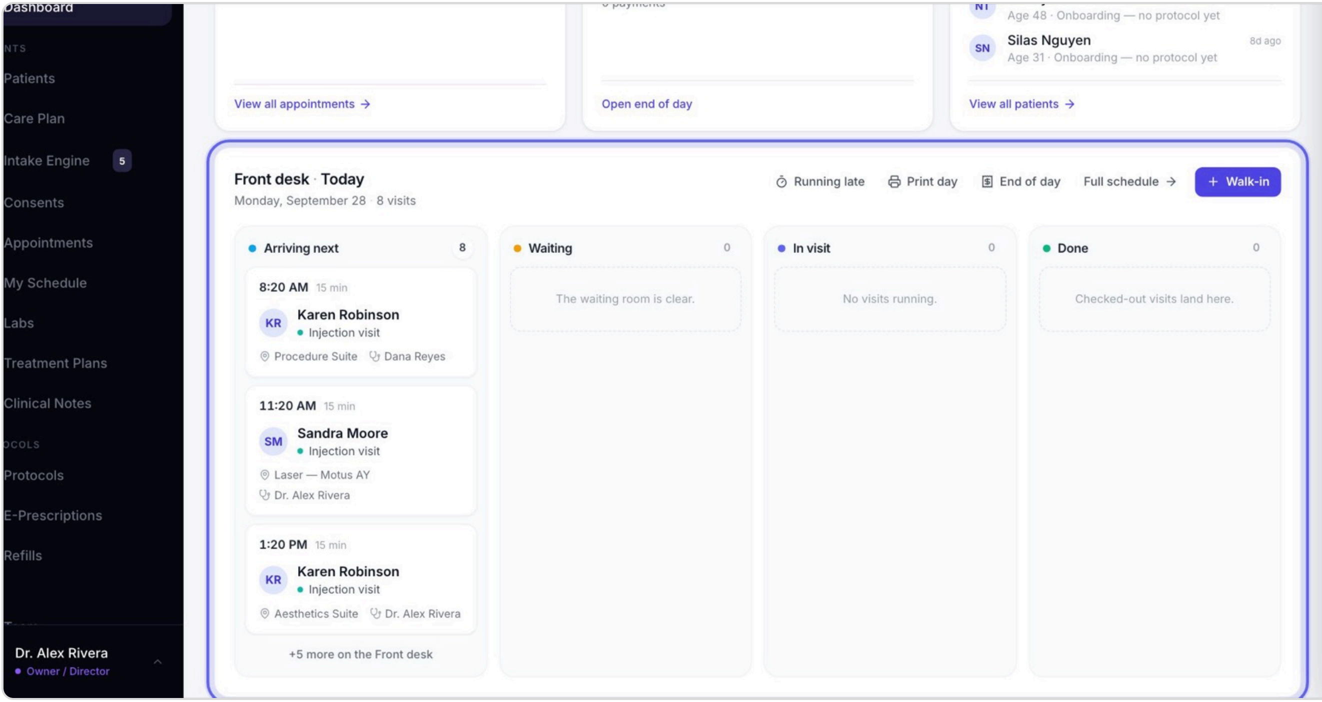
You see each patient's contact details, not their medical record, and you don't see the clinic's revenue.

2. WHAT'S IN YOUR SIDEBAR

1. **Dashboard**, **Appointments** and **Patients** for the day and the people in it.
2. **Consents** for the forms patients sign, and **Dispensary** for the supplements you hand over.
3. **Messages** and **Time Clock**, plus **AI Assistant** for any how-to question.
4. The first time you sign in on a computer, a welcome offers the tutorial. It walks only these pages.

3. START THE DAY

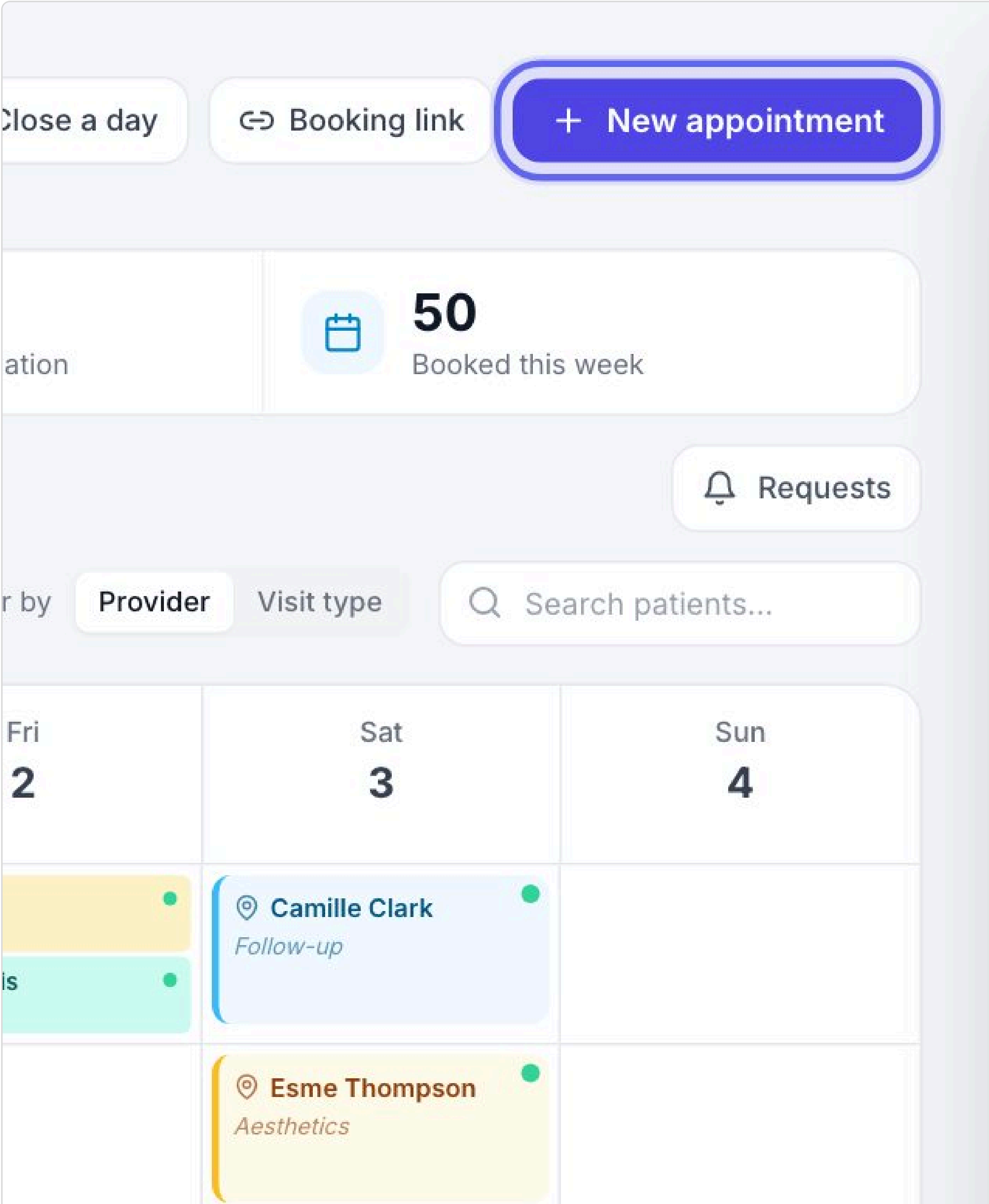
1. The numbers at the top are **Appts Today**, **Check-ins Today** and **Refills Due**.
2. **Front desk · Today** shows the day in four lanes: **Arriving next**, **Waiting**, **In visit** and **Done**.
3. Click a patient to move them along, or drag their card to the next lane.
4. **Walk-in** books someone who just came in. **Running late** tells a provider's patients they're behind. **Print day** prints the day sheet.



The day, lane by lane, with Walk-in, Running late and Print day.

4. BOOK A VISIT

1. On **Appointments**, click **New appointment**.
2. Pick the category, then the kind of visit.
3. Pick the patient and a time. Only times the provider is really free are shown.
4. Book it. The visit's forms, prep and deposit go out on their own.

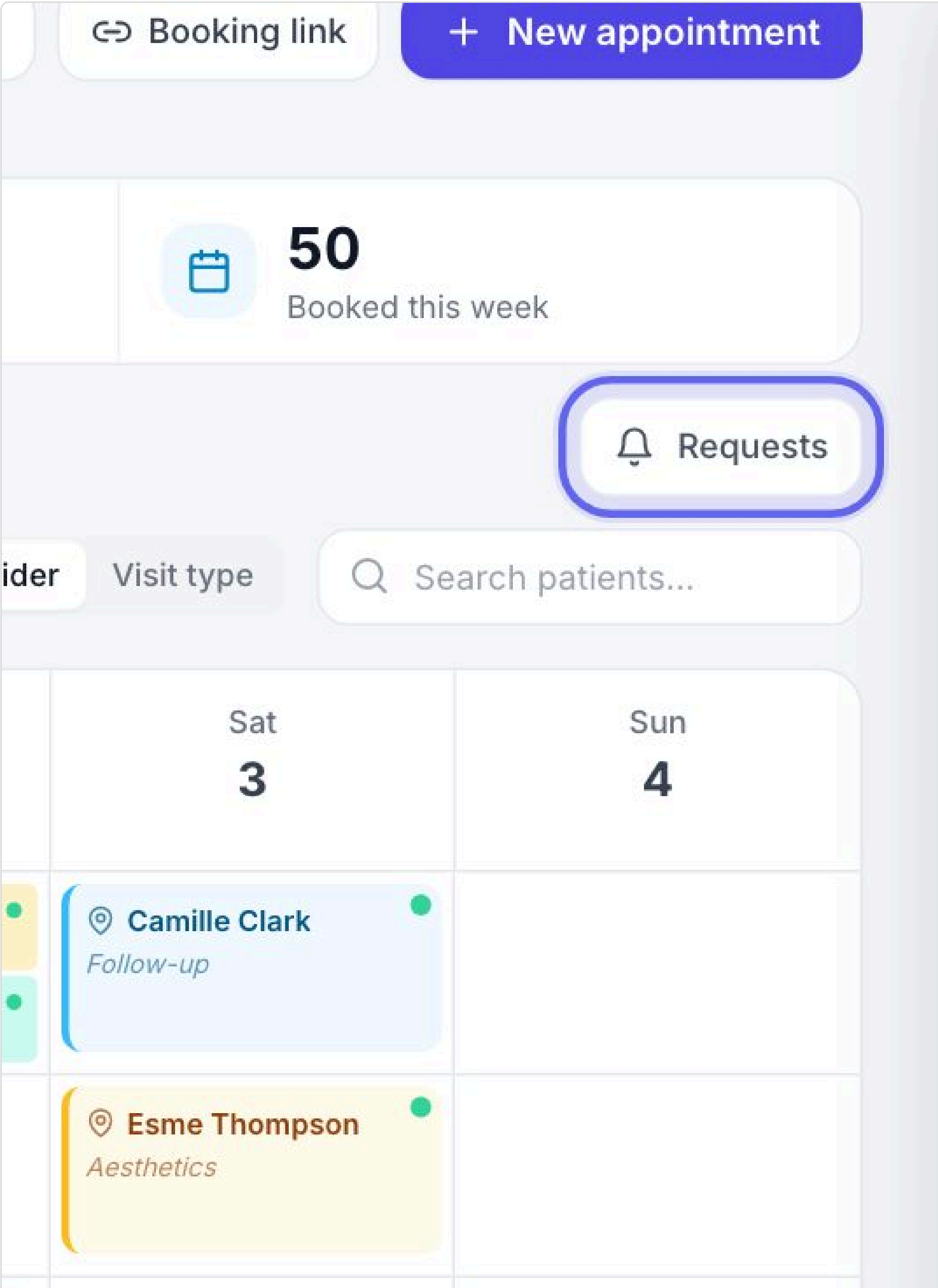


New appointment starts every booking.

5. REQUESTS AND CLOSED DAYS

1. Visits patients asked for online land under **Requests**. Approve one, or offer another time.

2. **Close a day** blocks new bookings for a holiday. Visits already booked stay put, so you decide about each one.
3. **Booking link** lets you copy the clinic’s link for a patient. Only an owner or manager can turn it on or change it.


Booking link
+ New appointment
50
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Visit type
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Camille Clark
Follow-up
Esme Thompson
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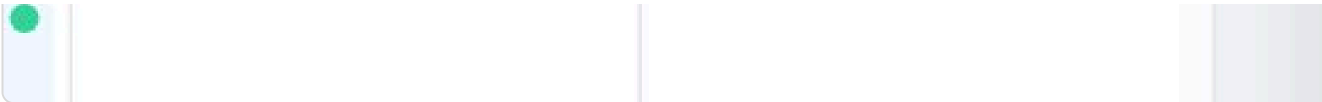
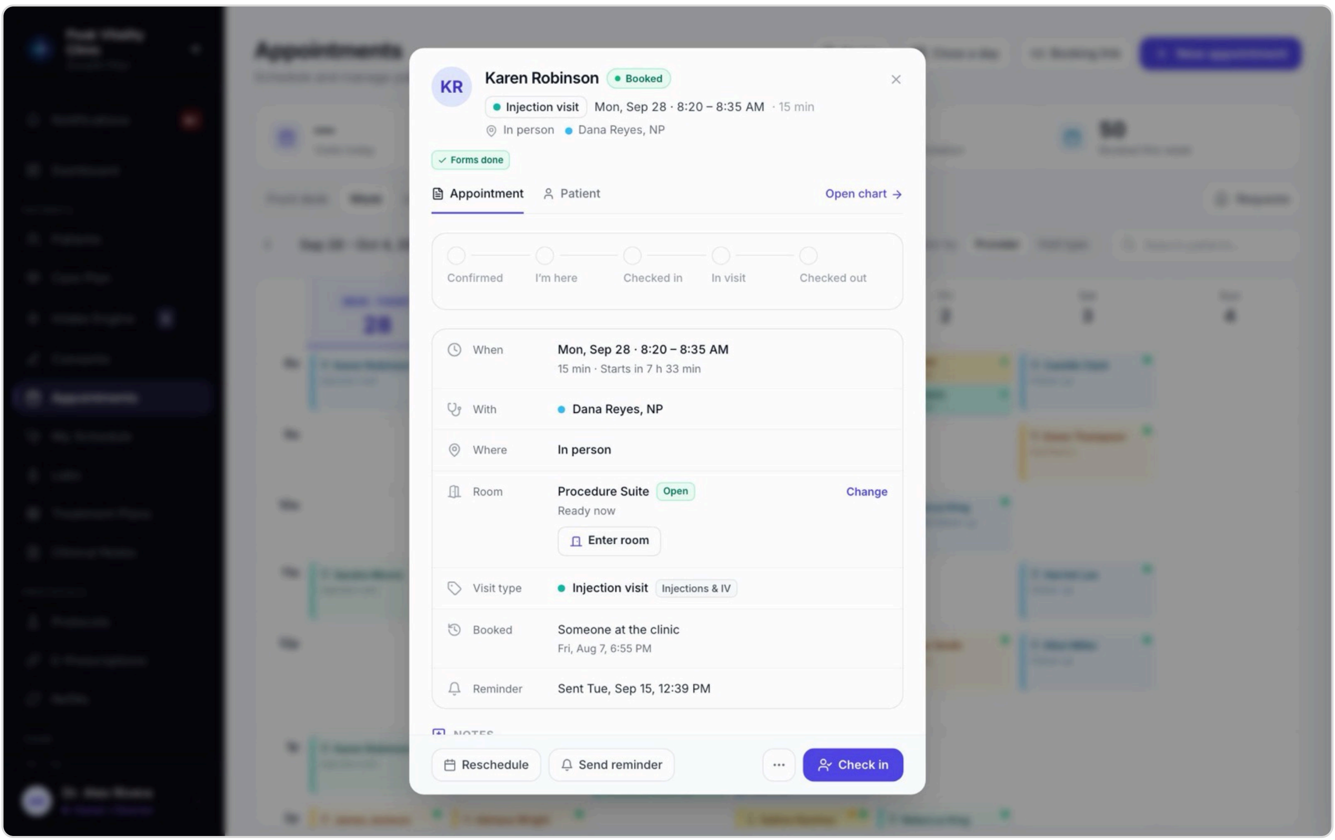


Requests: opens the visits patients asked for online.

6. CHECK IN, CHECK OUT

1. Open the **Front desk** tab on Appointments, or click the visit anywhere it shows.
2. The main button changes as the visit moves along: **Confirm**, **Check in**, **Check out**, then **Charge**.
3. Allergies show as a red tag at the top of the visit.
4. No-show and cancel are in the **...** menu. **Reschedule** moves the visit.



An appointment, opened. The main action changes as the visit moves along.

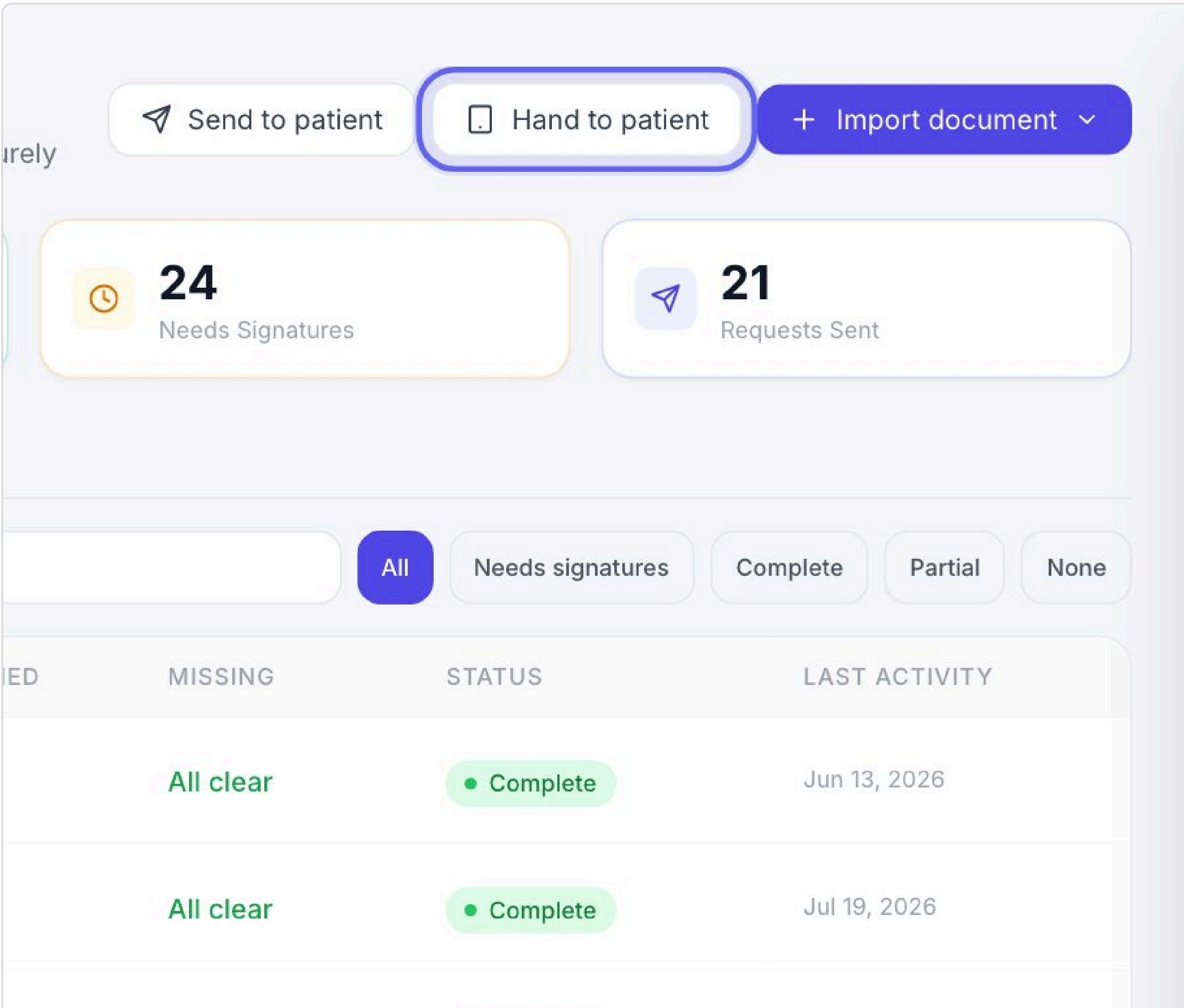
7. TAKE A PAYMENT

1. Press **Charge** on the visit. The visit's services and products are already in the basket.
2. Add or change lines, and add a saved discount if one applies.
3. Choose **Card on file**, **Terminal**, or **Something else...** for cash, a check and other ways.
4. Take the payment, then pick **Print**, **Email**, **Print & email**, or **Skip — no receipt needed**.

Tip. Refunds and the day's takings belong to people who can see the clinic's money. Ask an owner or manager.

8. GET FORMS SIGNED

1. On **Consents**, **Send to patient** sends forms to the patient's portal to sign.
2. **Hand to patient** lets them sign on a tablet at the desk.
3. Open the patient's visit to see which of their forms were sent and which are signed. What they signed stays in the chart, for clinical staff.



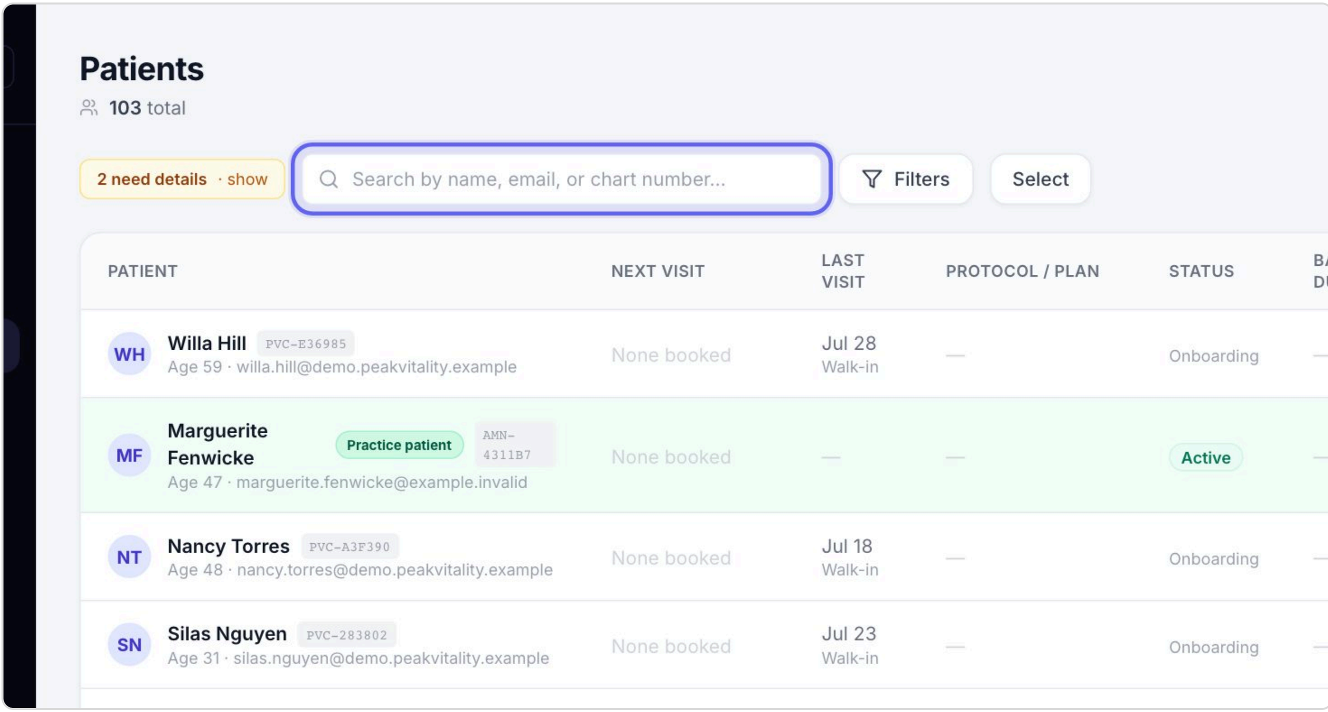
Hand to patient: sign on a tablet at the desk.

Tip. Practice patients never get emails, texts or bills, so they're safe to send forms to.

9. FIND A PATIENT

1. On **Patients**, type a name, email, chart number or portal ID. The page says **Demographics view**: each row shows the phone, status and next appointment.

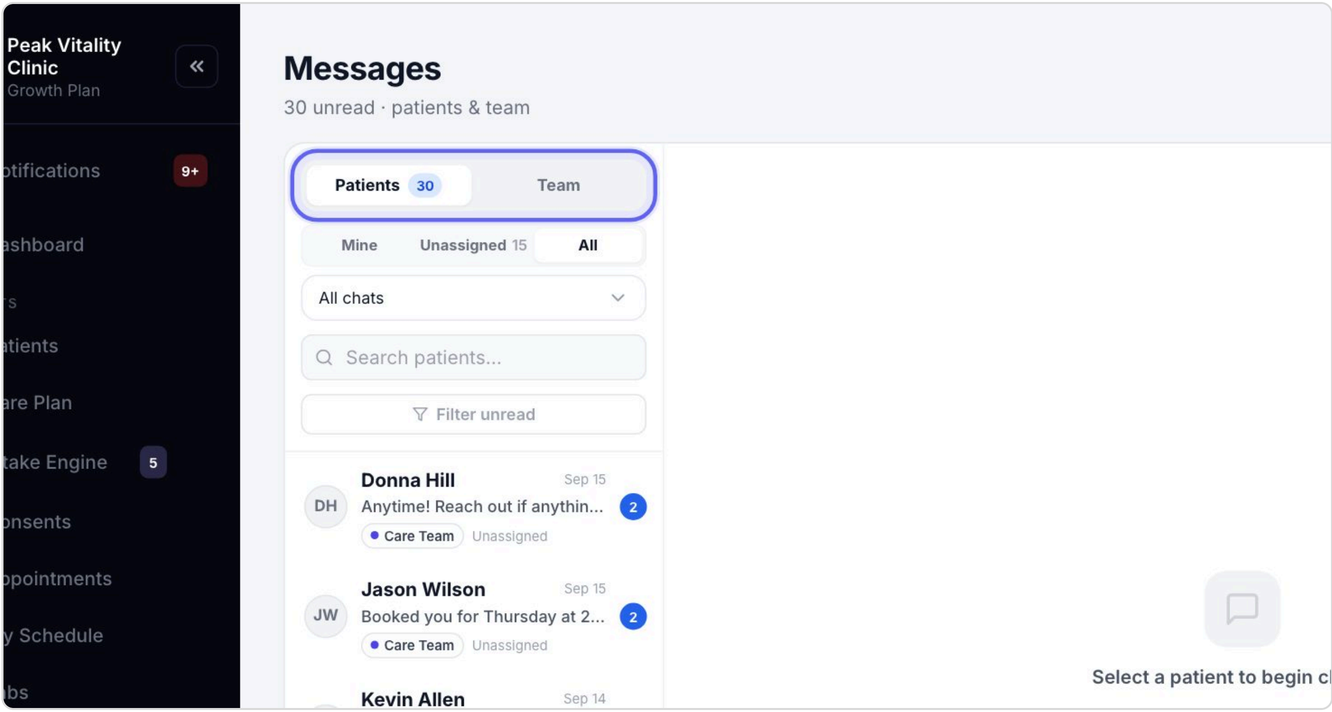
2. Click a patient to open their contact card: allergies, date of birth, phone, email, preferred pharmacy and emergency contact.
3. Tap the phone number to call. You're then asked how the call went, so it's logged.



Search looks through every patient, not just this page.

10. MESSAGES

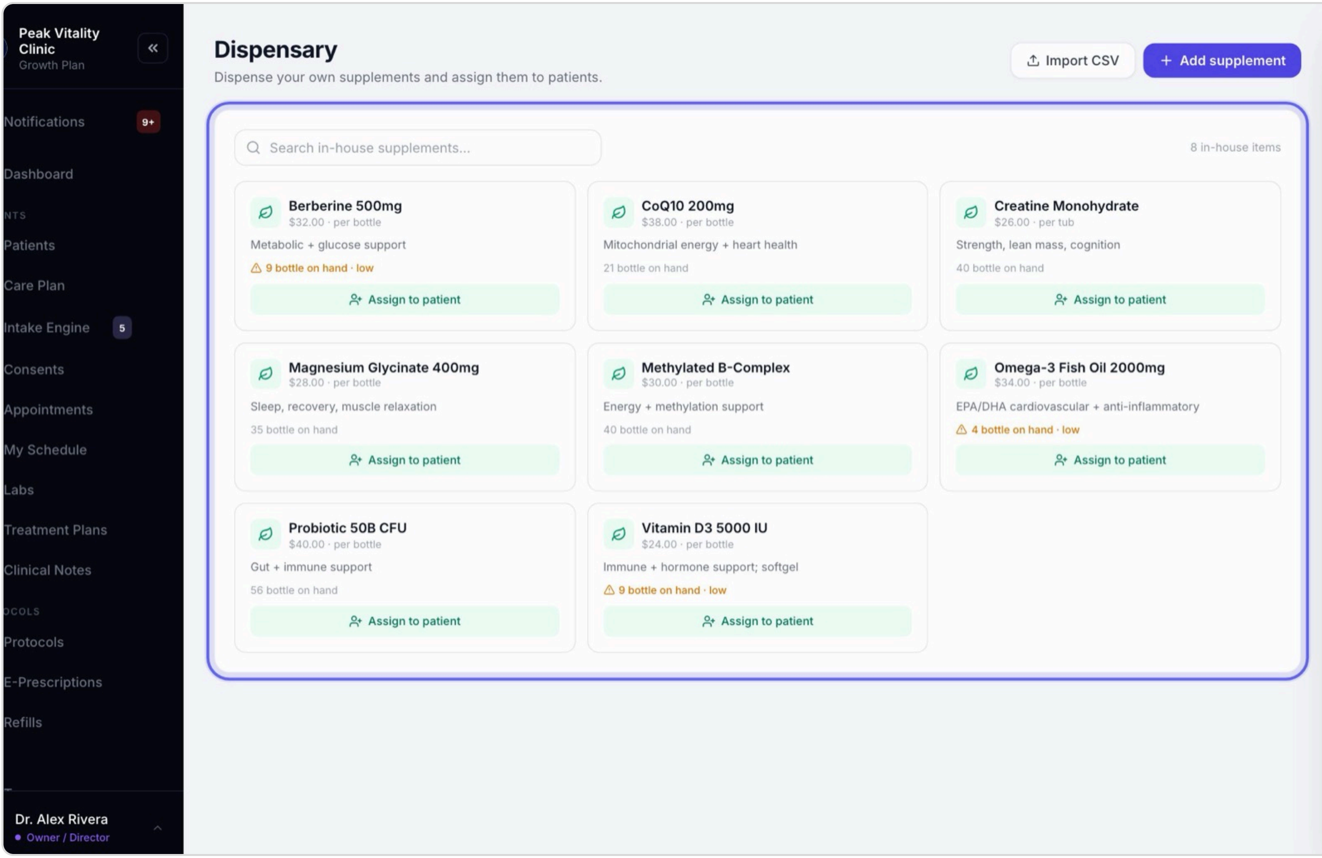
1. Your team's chats are all here: channels, groups and direct messages.
2. When someone hands you a patient's conversation, it shows up for you. Answer it in plain text.
3. Pick **Internal note** to write to your team inside a conversation. The patient never sees it.



Patient conversations on one side, team chats on the other.

11. HAND OUT SUPPLEMENTS

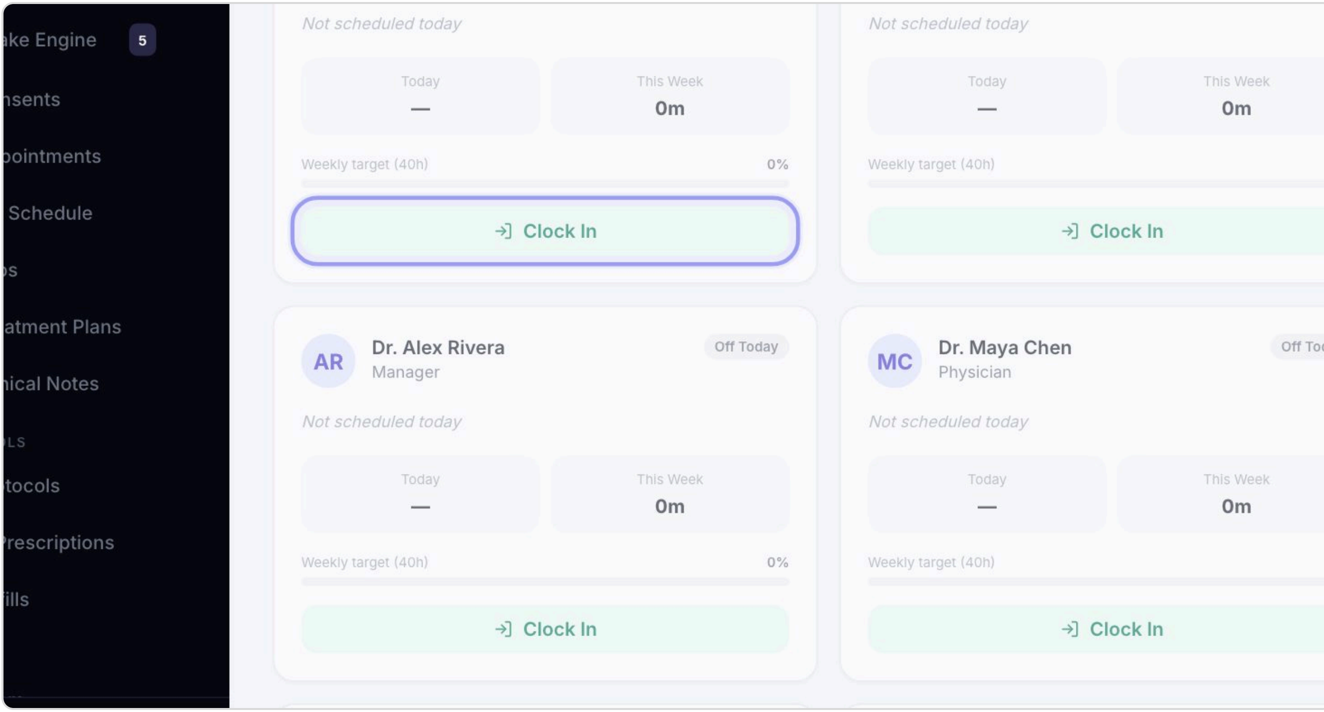
1. Open **Dispensary**. Every supplement you stock is on the shelf, with how many are on hand.
2. Press **Assign to patient**. Pick the patient, the dose, and pickup or shipping. It goes on their plan.



The dispensary shelf. Assign to patient hands one over.

12. CLOCK IN AND OUT

On **Time Clock**, press **Clock In** when you arrive, **Break** when you step away, and **Clock Out** when you leave. You see only your own hours.



Clock in, clock out, and take a break.

13. WHAT YOUR ROLE CAN'T DO BY DEFAULT

1. Open a full chart, clinical notes, lab results or signed forms.
2. Add a new patient by hand. Owners, managers and clinicians can.
3. Give refunds, or see Billing, Analytics or the day's takings.
4. Change visit types, the booking link, or anything in Settings.
5. An owner or manager can change what your role can do in **Settings → Roles & Permissions**.