

For nurses and medical assistants

Your day as a nurse, NP, PA or medical assistant: the schedule, checking patients in, your own visits, charts, labs, the dispensary and your messages.

Role manual · For Nurses, NPs and PAs, Medical assistants · aminova.health/university/role-nurse-ma

1. TWO ROLES

Nurse / NP / PA is a clinical role. You open full charts, write notes, work on care plans and treatment plans, and order labs. You can't sign prescriptions or approve refills unless an owner allows it.

Medical Assistant supports the clinic floor: the schedule, check-ins and the dispensary. On a chart, a medical assistant sees contact details only.

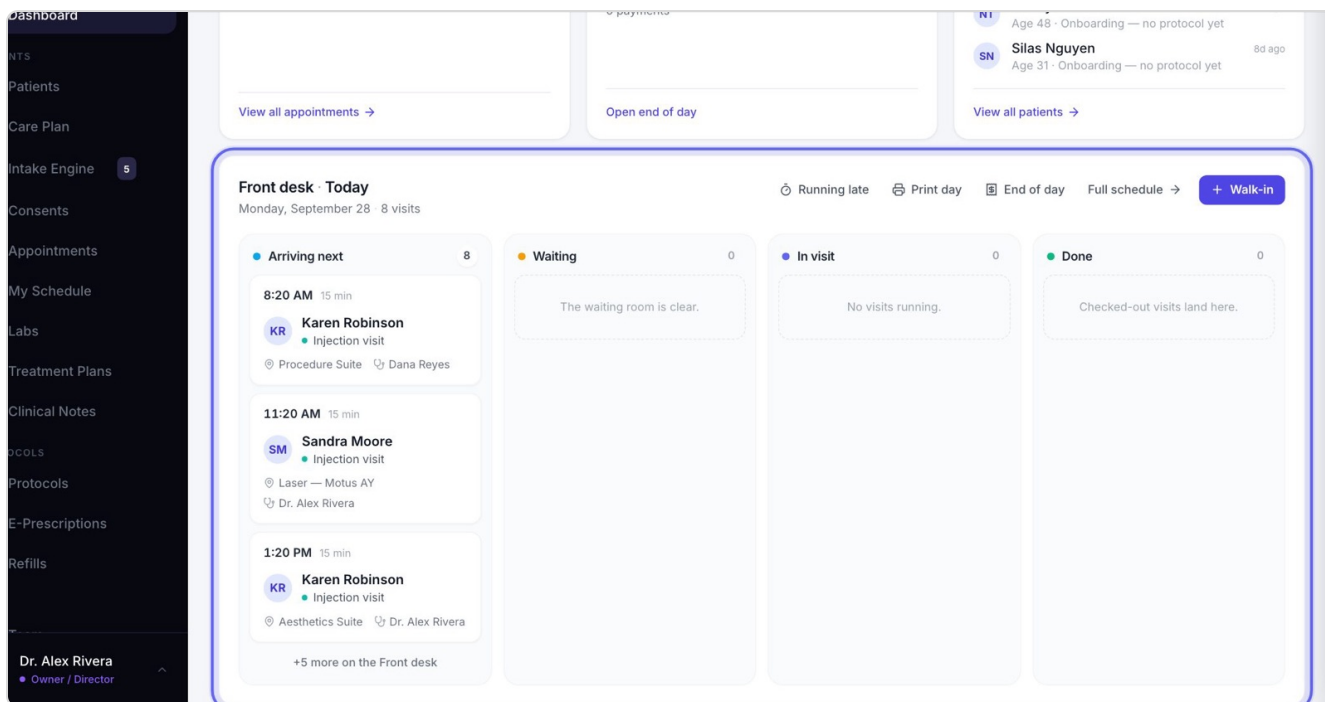
Your role shows under your name at the bottom of the sidebar.

2. WHAT'S IN YOUR SIDEBAR

1. Both roles: **Dashboard, Patients, Consents, Appointments, Labs, Messages** and **Time Clock**.
2. Nurses also get **Care Plan, My Schedule, Treatment Plans, Clinical Notes, Intake, Protocols, E-Prescriptions, Refills** and **Documents**.
3. Medical assistants also get **Dispensary**. For a nurse, the dispensary is a tab inside **Treatment Plans**.
4. The first time you sign in on a computer, a welcome offers the tutorial. It walks only the pages your role uses.

3. YOUR DASHBOARD

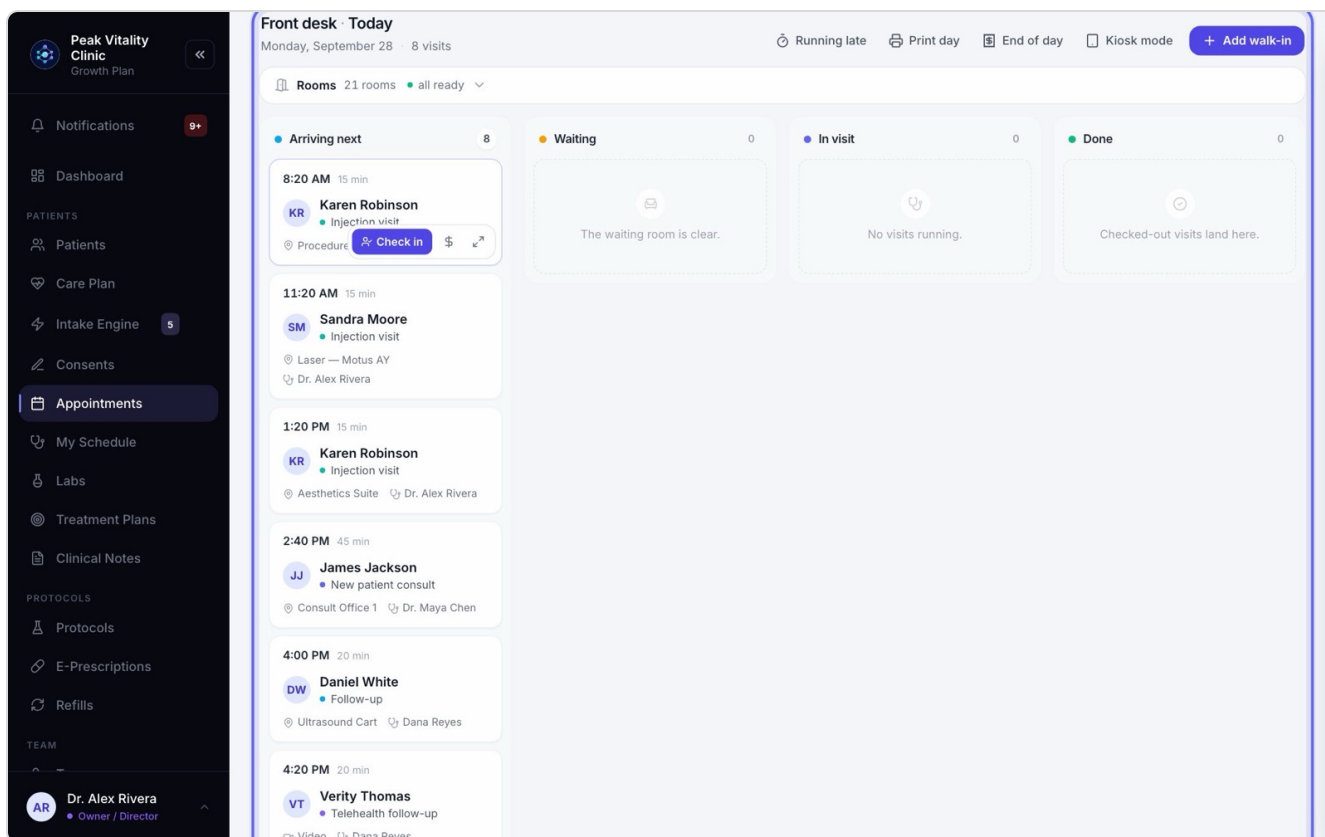
1. For a nurse, the numbers across the top are **My Patients, Active Protocols** and **Refills Pending**.
2. **Front desk • Today** shows the day in lanes: arriving, waiting, in a visit and done.
3. Nurses also see the **Operations Queue** with refills and shipments that need a person. Clicking a refill opens it on Refills.



The day, lane by lane. Click a patient to open the visit.

4. CHECK A PATIENT IN

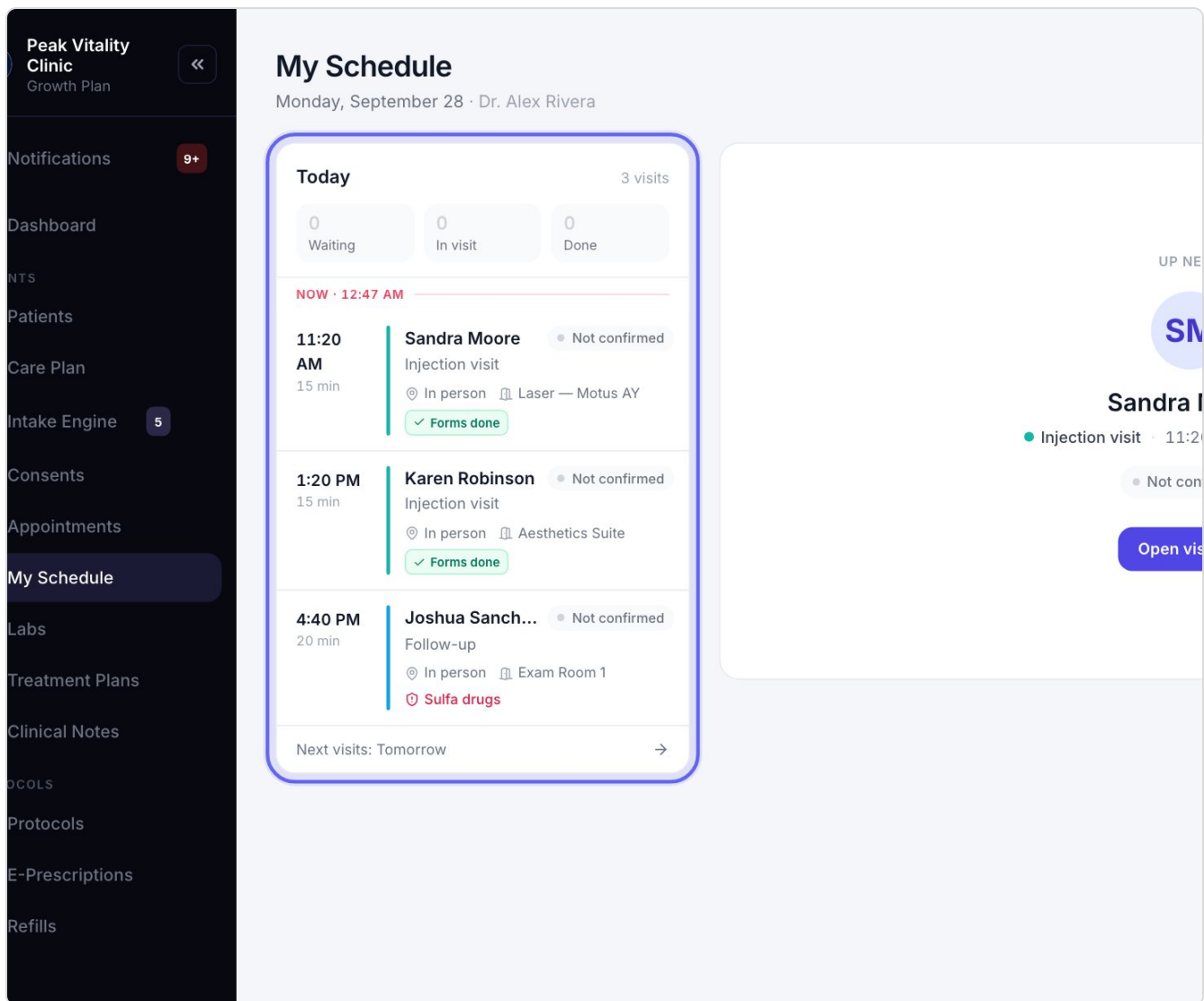
1. Go to **Appointments** and open the **Front desk** tab.
2. Click the patient in the arriving lane, and press **Check in**.
3. Move them along as the visit goes: in a visit, then done. The provider is told their patient is waiting.
4. Allergies show as a red tag at the top of every visit.



The front desk: today, lane by lane.

5. YOUR OWN VISITS (NURSES)

1. **My Schedule** lists the visits you are the provider on, covering, or helping with.
2. Open one to read the **Pre-Visit Brief**, start it, and write your note on **Post-Visit Note**.
3. **Start visit** also opens **Quick Visit**, where you record vitals and a short note.



Your day on My Schedule, in time order.

6. CHARTS

1. On **Patients**, search by name, email, chart number or portal ID.
2. Nurses: **All Patients** is the whole clinic, and **My Patients** is only yours. Click a patient to open the full chart.
3. Medical assistants: the page says **Demographics view**. A patient opens as a contact card: allergies, date of birth, phone, email, preferred pharmacy and emergency contact.
4. On the contact card, tap the phone number to call. You're then asked how the call went, so it's logged.

Peak Vitality Clinic

Growth Plan

Notifications9+

Dashboard

NTS

Patients

Care Plan

Intake Engine5

Consents

Appointments

My Schedule

Labs

Treatment Plans

Clinical Notes

COLS

Protocols

E-Prescriptions

Refills

Dr. Alex Rivera

Owner / Director

PATIENT	NEXT VISIT	LAST VISIT	PROTOCOL / PLAN	STATUS	BALANCE DUE
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		

The patient list. Click a row to open the patient.

7. NOTES AND PLANS (NURSES)

1. On **Clinical Notes**, click **New Note**, pick the patient and the kind of note, and type. Save a draft, or sign it.
2. **Care Plan** walks a visit step by step, including today's vitals.
3. **Treatment Plans** holds every patient's plan: the medicines, the doses and the weeks they run.
4. If your clinic has co-signature rules, some of your notes also go to a reviewer.

 Templates

+ New Note

Shared with patient

 Request co-sign ▾

 Amend

● Sep 15, 2026

Sep 15, 2026

Keep Injection sites clean and without

Start a note for any patient here.

8. LABS (NURSES)

1. On **Labs**, press **Order labs**, then pick the patient and the tests.
2. Have a result as a PDF or photo? Upload it, pick the patient, check the values and save.
3. The list shows the labs you ordered.

 Upload Results

 Create Requisition



 Panel Library

PDF

 Review & Send

 Schedule follow-up

 Assign a task

REFERENCE

UNIT

STATUS

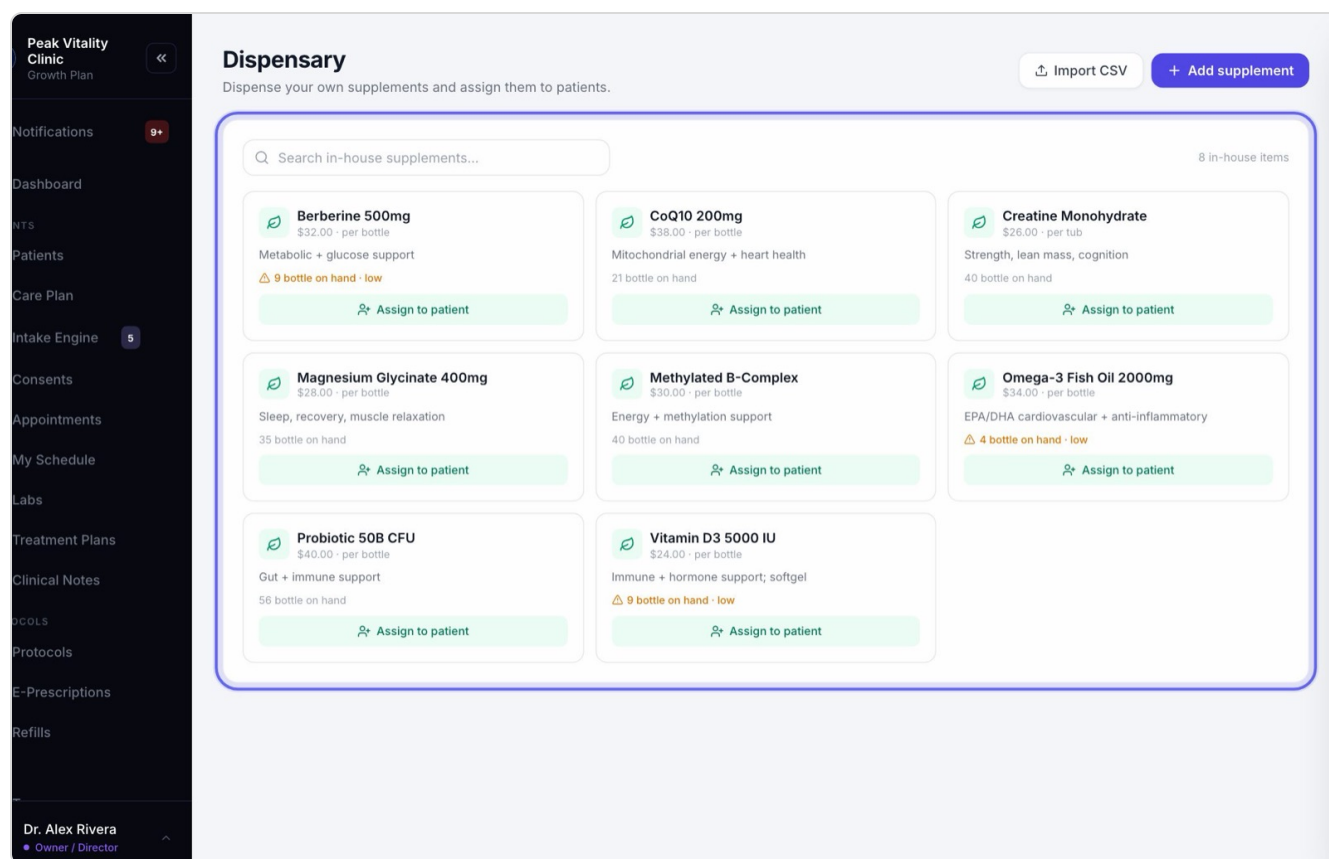
Starts a new lab order for the patient.

9. PRESCRIPTIONS AND REFILLS (NURSES)

1. On **E-Prescriptions** you can find any prescription and see where it stands. The page says **View only** — only prescribers can sign and send prescriptions.
2. A prescription waiting to be sent says **Pending physician sign-off**.
3. On **Refills**, you see the queue and where each refill is. A prescriber approves or declines.
4. Are you an NP or PA who prescribes? An owner can switch on **Sign & send prescriptions** for your role in **Settings → Roles & Permissions**.

10. HAND OUT SUPPLEMENTS

1. Medical assistants: open **Dispensary**. Nurses: open **Treatment Plans** and its **Dispensary** tab.
2. Each supplement you stock is on the shelf, with how many are on hand. Type part of a name to find one.
3. Press **Assign to patient**. Pick the patient, the dose, and pickup or shipping. It goes on their plan.
4. Your role doesn't take payments by default, so the charge is left for checkout.

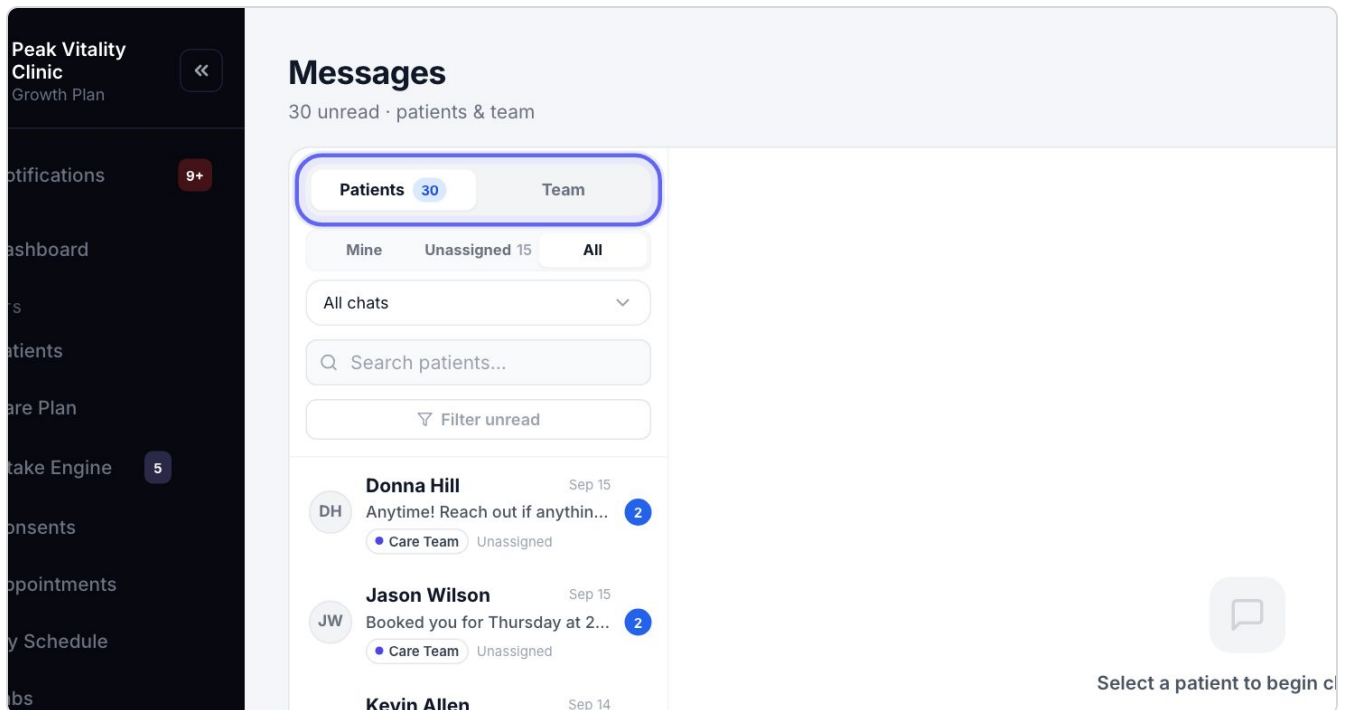


The dispensary shelf. Assign to patient hands one over.

11. MESSAGES

1. Nurses see every patient conversation, and choose **Mine**, **Unassigned** or **All**.
2. Medical assistants see team chats, and any patient conversation someone hands to them. They can answer those in plain text.

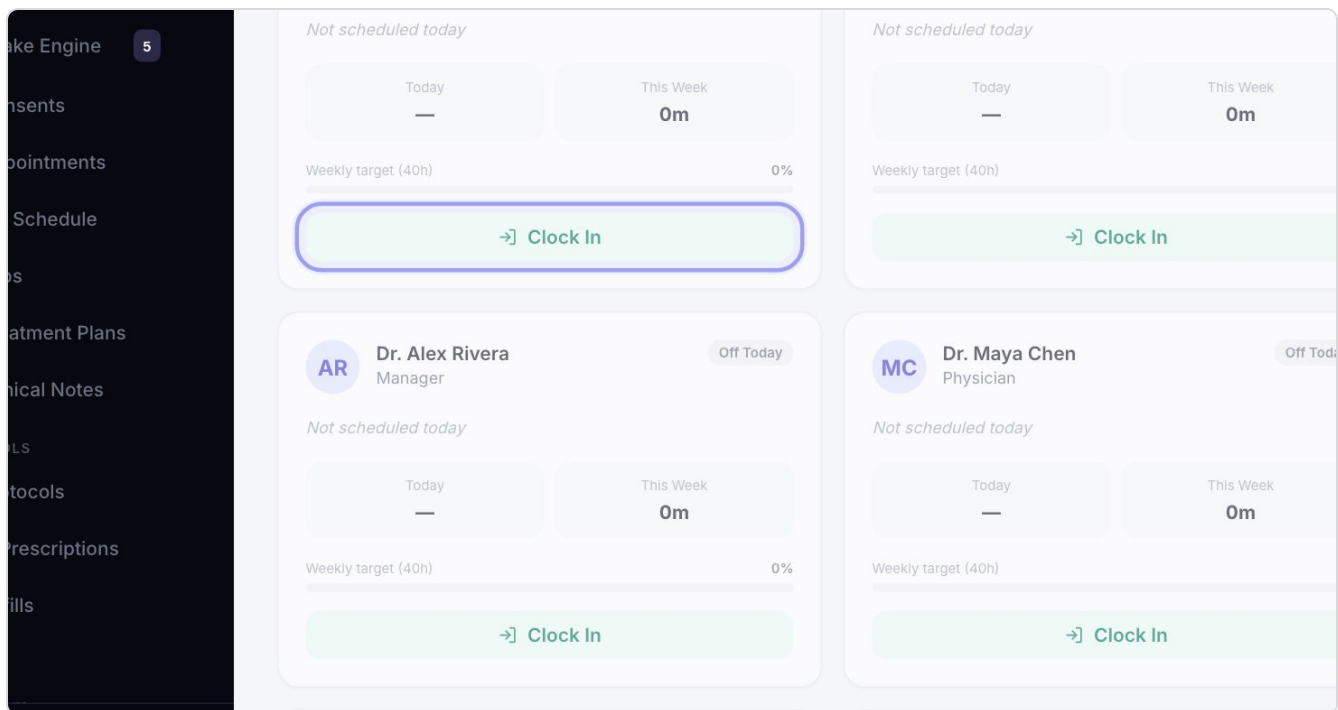
3. Pick **Internal note** instead of a reply to write to your team. The patient never sees it. Type @ to mention someone.



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

12. CLOCK IN AND OUT

1. On **Time Clock**, press **Clock In** when you arrive and **Clock Out** when you leave.
2. **Break** stops paid time until you end it.
3. You see only your own hours. If you forget to clock out, ask a manager to fix it.



Clock in, clock out, and take a break.

13. WHAT YOUR ROLE CAN'T DO BY DEFAULT

1. Neither role signs prescriptions, approves refills, or takes payments.
2. Neither role opens **Billing, Analytics, Team, Staff Scheduling** or **Settings**.
3. Medical assistants don't see clinical notes, lab results or signed forms, and can't order labs or add a patient.
4. An owner or manager can change what your role can do in **Settings** → **Roles & Permissions**.