For owners and practice managers

Everything you need to set up the clinic, bring your team in, decide who can do what, and keep an eye on the money and the day.

Role manual · For Owners, Managers · aminova.health/university/role-owner-manager

1. YOUR ROLE

Owner / Director can open every page and use every feature. The owner role can never be limited, so you can't lock yourself out.

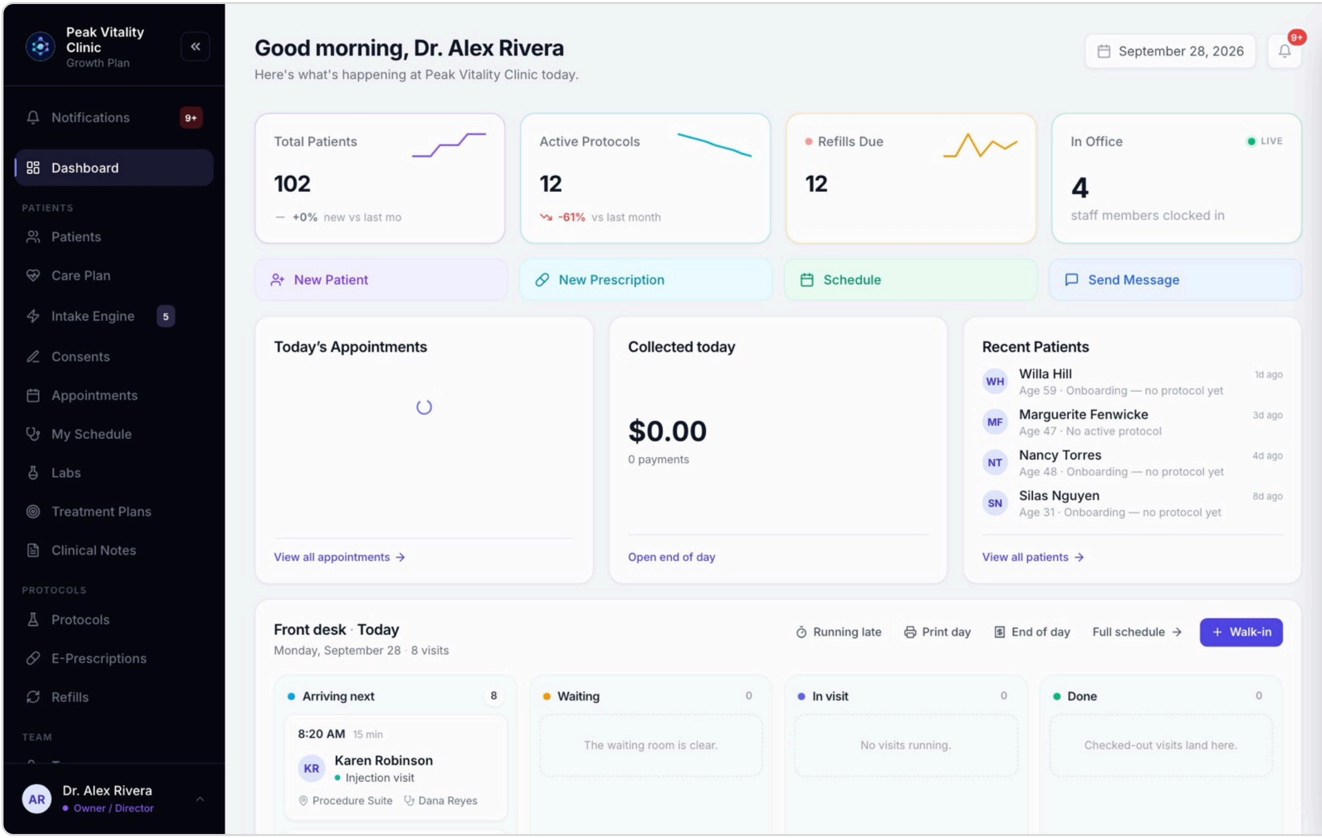
Practice Manager gets almost the same. By default a manager can't sign and send prescriptions, and **E-Prescriptions** and **My Schedule** are off. Everything else, from Billing to Settings, is theirs.

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

2. WHEN YOU SIGN IN

You land on the **Dashboard**. It shows today's numbers, today's visits, the front desk lanes, the money taken today, and the work queue.

The first time you sign in on a computer, a welcome offers the tutorial. **Start the tutorial** walks you through every page you use, one at a time. You can end it any time and pick it up again from your name at the bottom of the sidebar.



The Dashboard, as an owner sees it.

3. YOUR CHECKLIST

The checklist box on the right has two lists. **Learn Aminova** is the everyday jobs, each done once on a practice patient. **Set up your clinic** is what has to be in place before you open. Only owners and managers see the second list.

An item ticks itself when the thing really exists. **Show me** takes you to the right page and lights up each click. Hid the box? Click your name at the bottom of the sidebar and pick **Show the checklist**.

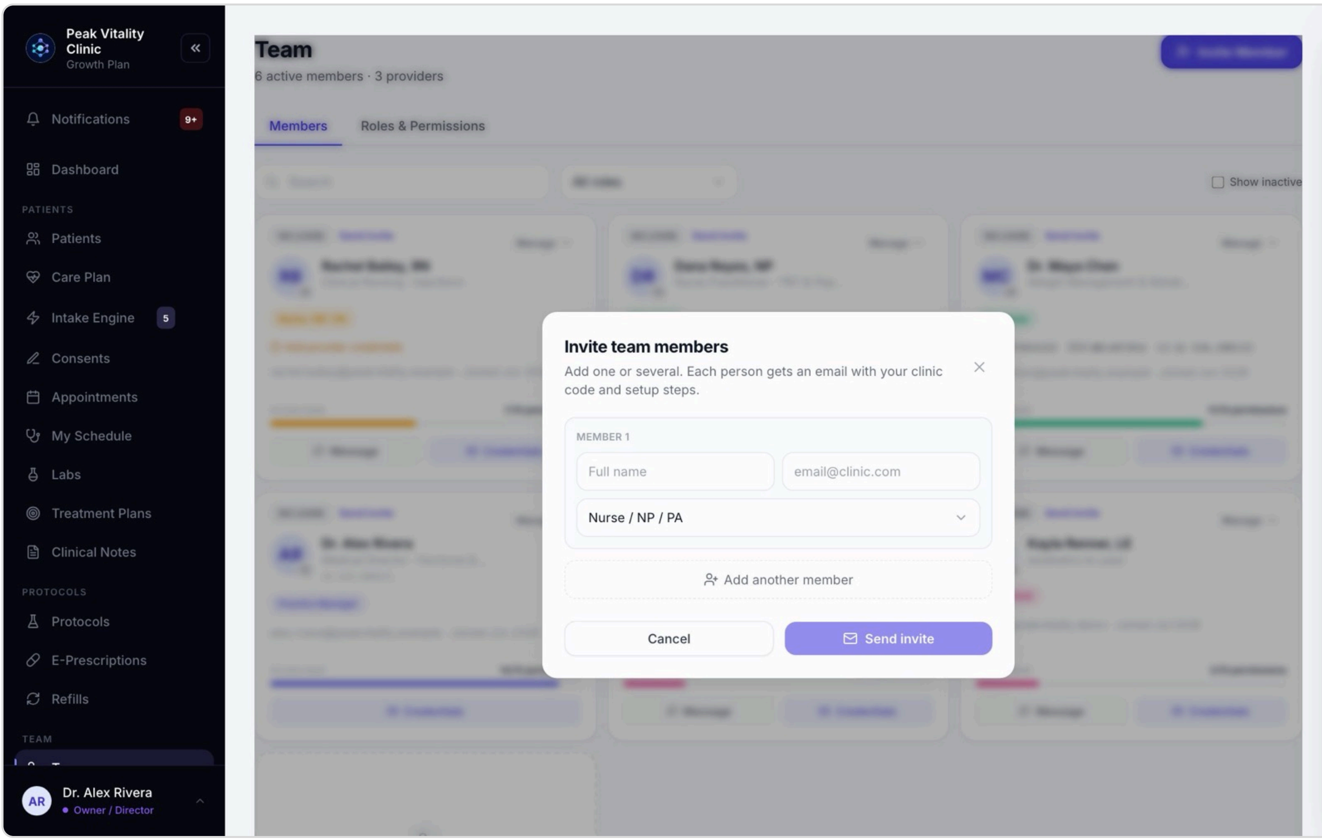
4. SET UP THE CLINIC, IN ORDER

1. Your clinic's details, time zone and opening hours, in **Settings**.
2. Your visit types, with the forms and consents that go out with each booking, on **Appointments → Visit types**.
3. Your consent forms, on **Consents**.
4. Your team, on **Team**. Then who works when, on **Staff Scheduling**.
5. Card payments, in **Settings → Payments & Plans**.
6. e-Prescribing, from **Setup** on **E-Prescriptions**, if your plan includes it.
7. Your booking link, on **Appointments**. Then bring in your patients from your old system.

> **Tip.** Each of these has its own setup guide. They are listed at the end of this page.

5. INVITE YOUR TEAM

1. Go to **Team** and click **Invite Member**.
2. Type each person's name and email, and pick their role. **Add another member** adds a row.
3. Press **Send invite**. Each person gets an email with your clinic code and the steps to set up their own login.
4. Invites nobody has accepted yet wait under **Pending Invitations**. **Refresh** sends the email again. **Cancel** takes it back.



Invite team members: a name, an email and a role for each person.

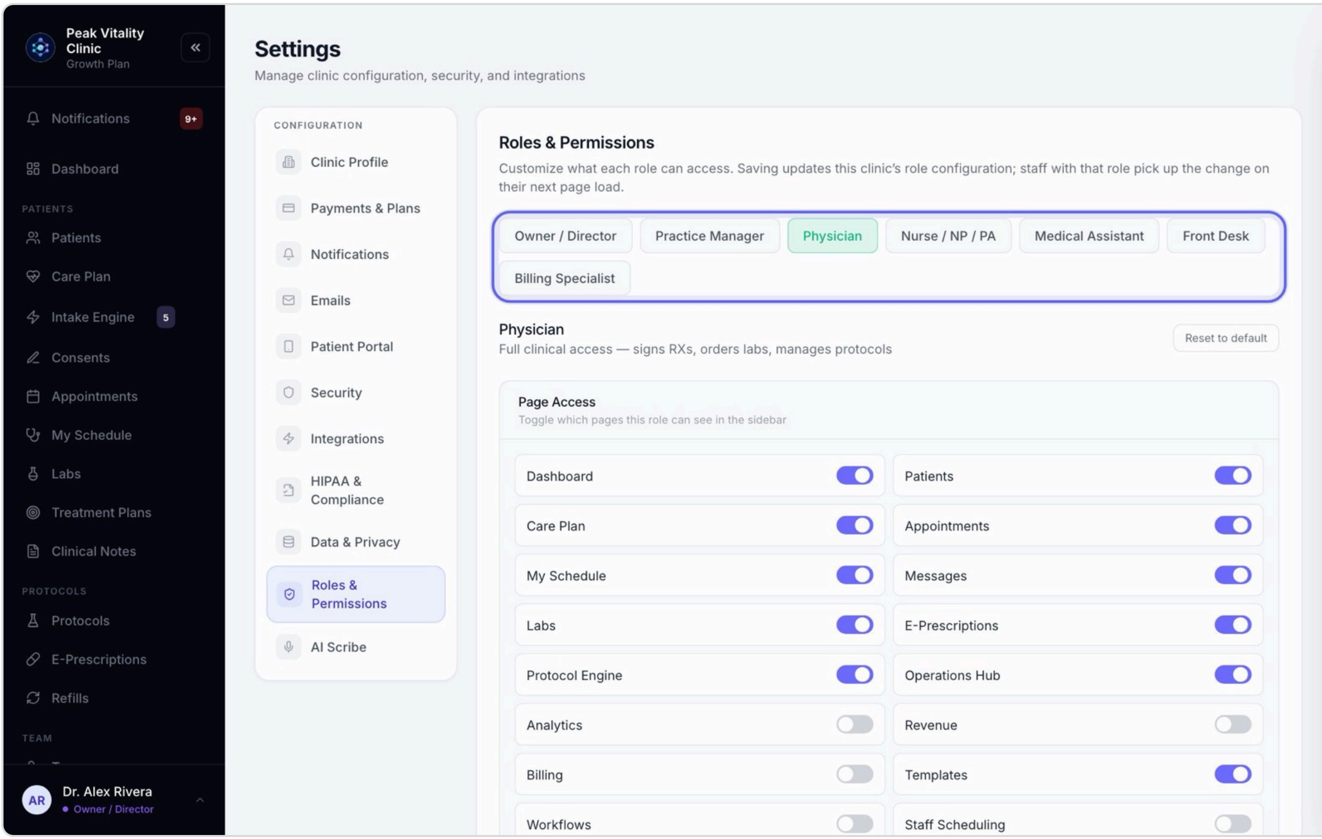
6. PICK THE RIGHT ROLE

1. **Physician**: sees patients, writes notes, orders labs, signs and sends prescriptions.
2. **Nurse / NP / PA**: clinical work, notes and lab orders. Can't sign prescriptions unless you allow it.
3. **Medical Assistant**: check-ins, patient prep and the dispensary. Sees contact details only on a chart.
4. **Front Desk**: booking, check-in, forms and taking payments. Sees contact details only on a chart, and no clinic revenue.
5. **Billing Specialist**: Billing and Analytics. No schedule and no charts.

7. CHANGE WHAT A ROLE CAN DO

1. Go to **Settings** and pick **Roles & Permissions**.
2. Click a role. Under **Page Access**, switch pages on or off in their sidebar.

3. Under **Feature Access**, switch actions on or off, like **Take payments & print receipts** or **Full patient record access**. A changed switch is marked **MODIFIED**.
4. Press **Save Permission Changes**. Staff with that role get the change the next time a page loads.
5. Only provider roles can be allowed to sign and send prescriptions. The Owner role can't be changed.



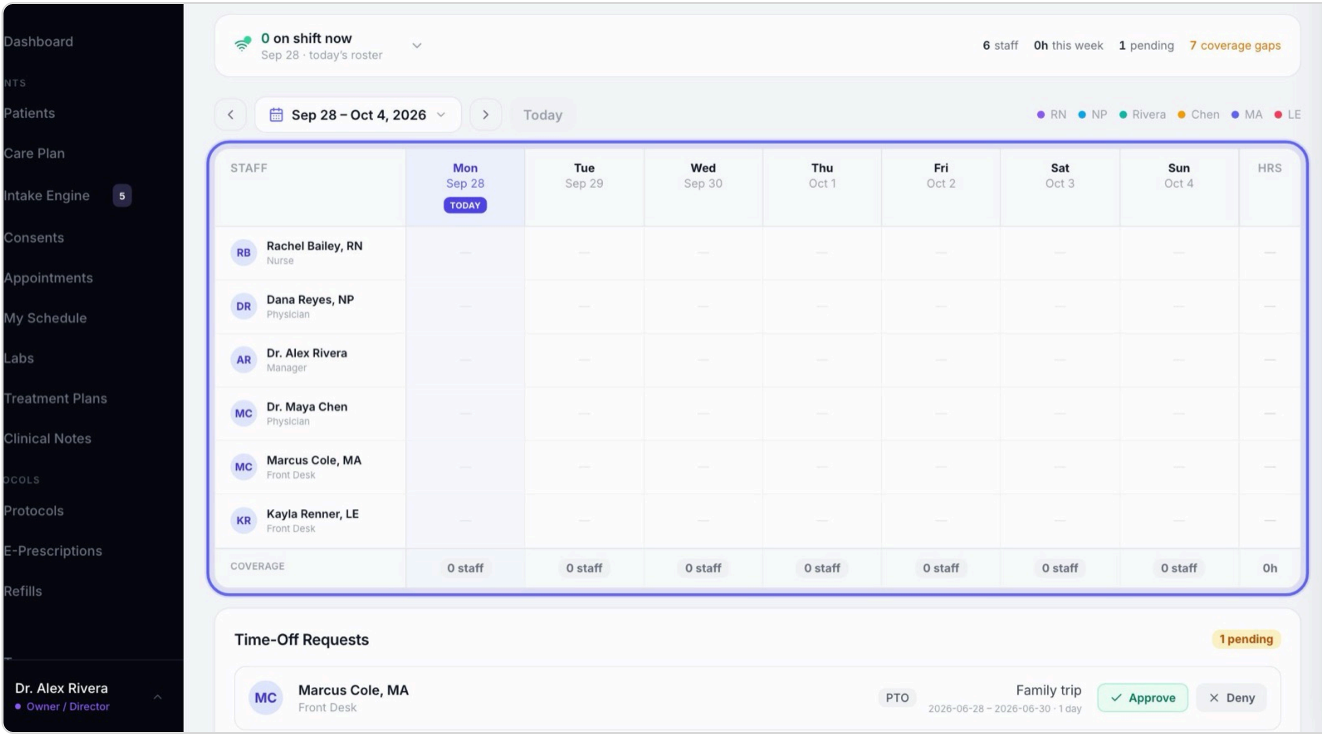
Roles & Permissions: pick a role, then its pages and actions.

8. CHANGE ONE PERSON

1. On **Team**, open the menu on that person's card.
2. **Edit Role** moves them to another role. Press **Save Role**.
3. **Edit Credentials** holds their title, phone and, for providers, NPI, DEA and license. Tick **Sees patients** so patients can be booked with them.
4. **Reset 2FA**, **Sign out everywhere** and **Deactivate** are there when someone loses a phone or leaves.

9. WHO WORKS WHEN

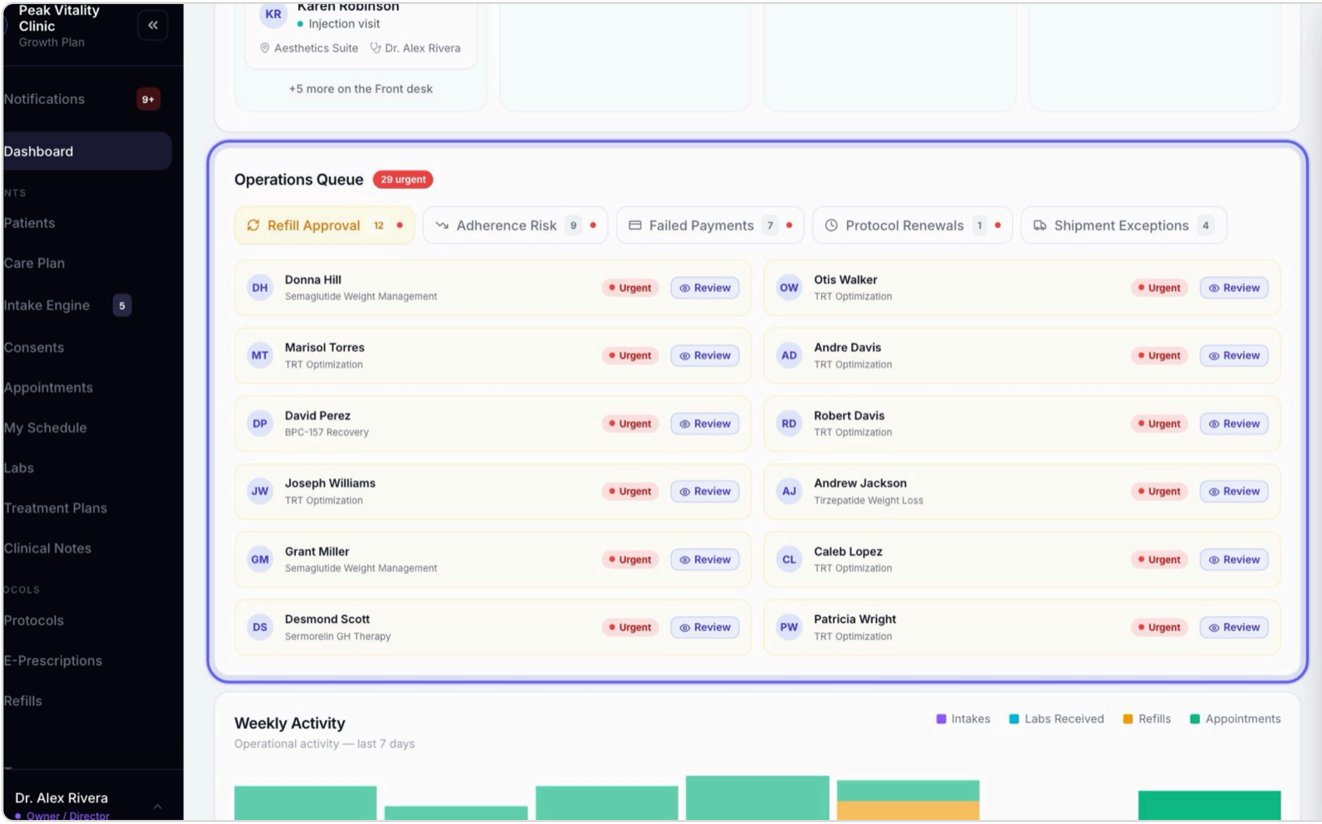
1. On **Staff Scheduling**, add shifts for each person. For anyone who sees patients, their shifts are the times patients can book them.
2. Approve or deny time-off requests there too.
3. On **Time Clock**, you see everyone's hours. Fix a missed punch with a reason, then export hours for your payroll company.



The roster: one row per person, one column per day.

10. WATCH THE DAY

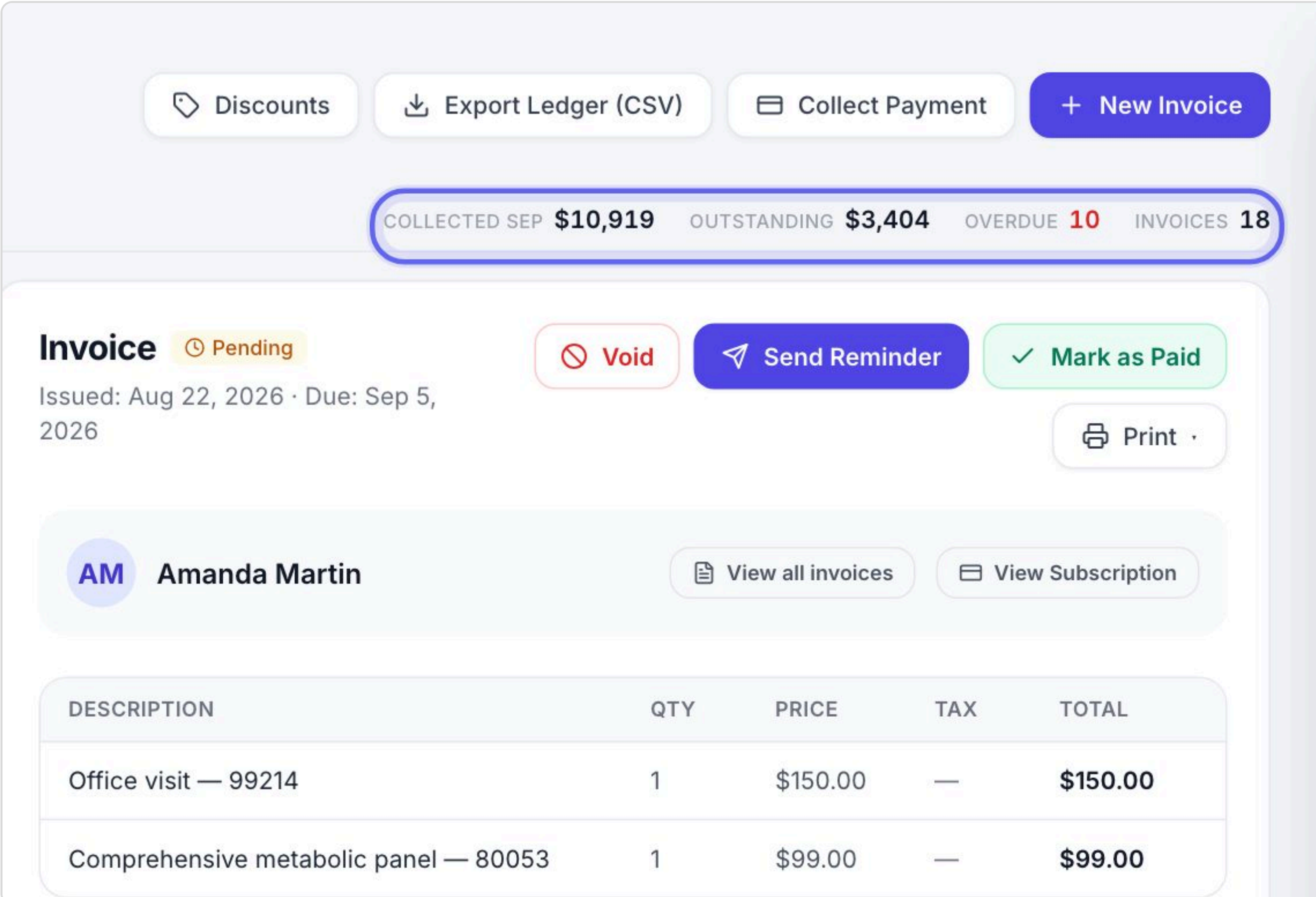
1. On the **Dashboard**, **Collected today** shows the money taken. **Open end of day** splits it by payment method.
2. The **Operations Queue** lists work that needs a person: refills to approve, patients falling behind, failed payments, renewals and shipments. As an owner or manager you see every tab.
3. The bell at the top of the sidebar holds anything new for you, and the tasks your team sends.



The Operations Queue: one tab per kind of work.

11. THE MONEY

1. **Billing** is every invoice, payment, membership and refund. Only people who can see revenue can give a refund.
2. **Analytics** shows money collected, recurring revenue, new patients and finished visits, over the time you pick.
3. Its **Revenue Intelligence** tab digs into money owed, renewals coming up and plans at risk of canceling.



Billing's numbers: collected, outstanding, overdue and invoices.

12. JOBS ONLY OWNERS AND MANAGERS DO

1. Build and change visit types, and turn on or change the booking link.
2. Build intake forms in **Intake Engine**, and bring in consent forms on **Consents**.
3. Send messages to many patients at once from **Communications**, and set how your emails look.
4. Choose who gets each patient chat, and the closed-office reply, under **Messages**.
5. Set up **Workflows**, check the **HIPAA Audit Trail**, and change anything in **Settings**.

Tip. Try things on the practice patient first. A practice patient never gets emails, texts or bills.