

For providers

Your day as a physician or prescribing provider: your schedule, the visit, your notes, prescriptions, refills and labs, all in the order you meet them.

Role manual · For Physicians, Prescribing NPs and PAs · aminova.health/university/role-provider

1. YOUR ROLE

Most providers have the **Physician** role. It opens every clinical page: your schedule, charts, notes, care plans, labs, prescriptions and refills.

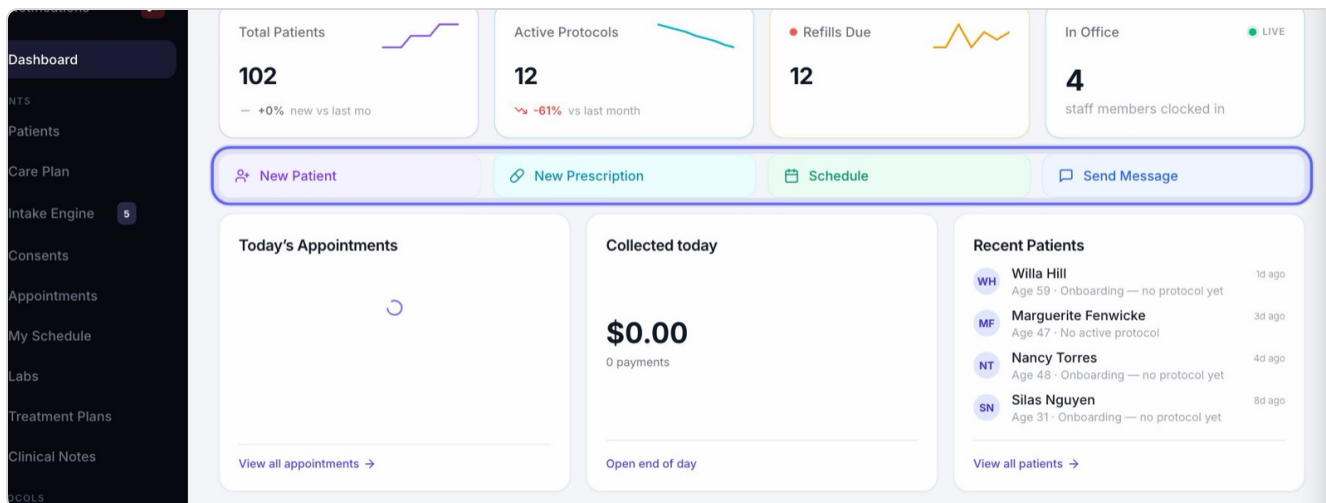
Nurse practitioners and PAs usually have the **Nurse / NP / PA** role. It can't sign prescriptions until an owner switches on **Sign & send prescriptions** for it in **Settings → Roles & Permissions**. After that, everything here about prescribing applies to you too.

2. WHAT'S IN YOUR SIDEBAR

1. **Patients, Care Plan, Appointments, My Schedule, Labs, Treatment Plans** and **Clinical Notes** for the visit itself.
2. **Intake Engine** and **Consents** for the forms patients fill in and sign.
3. **Protocols, E-Prescriptions** and **Refills** for what patients are on.
4. **Messages, Time Clock, Inventory, Products** and **Documents** for everything around it.
5. **Co-signatures** appears only if your clinic names you as a reviewer. Labs and E-Prescriptions show a lock if your clinic's plan doesn't include them.

3. WHEN YOU SIGN IN

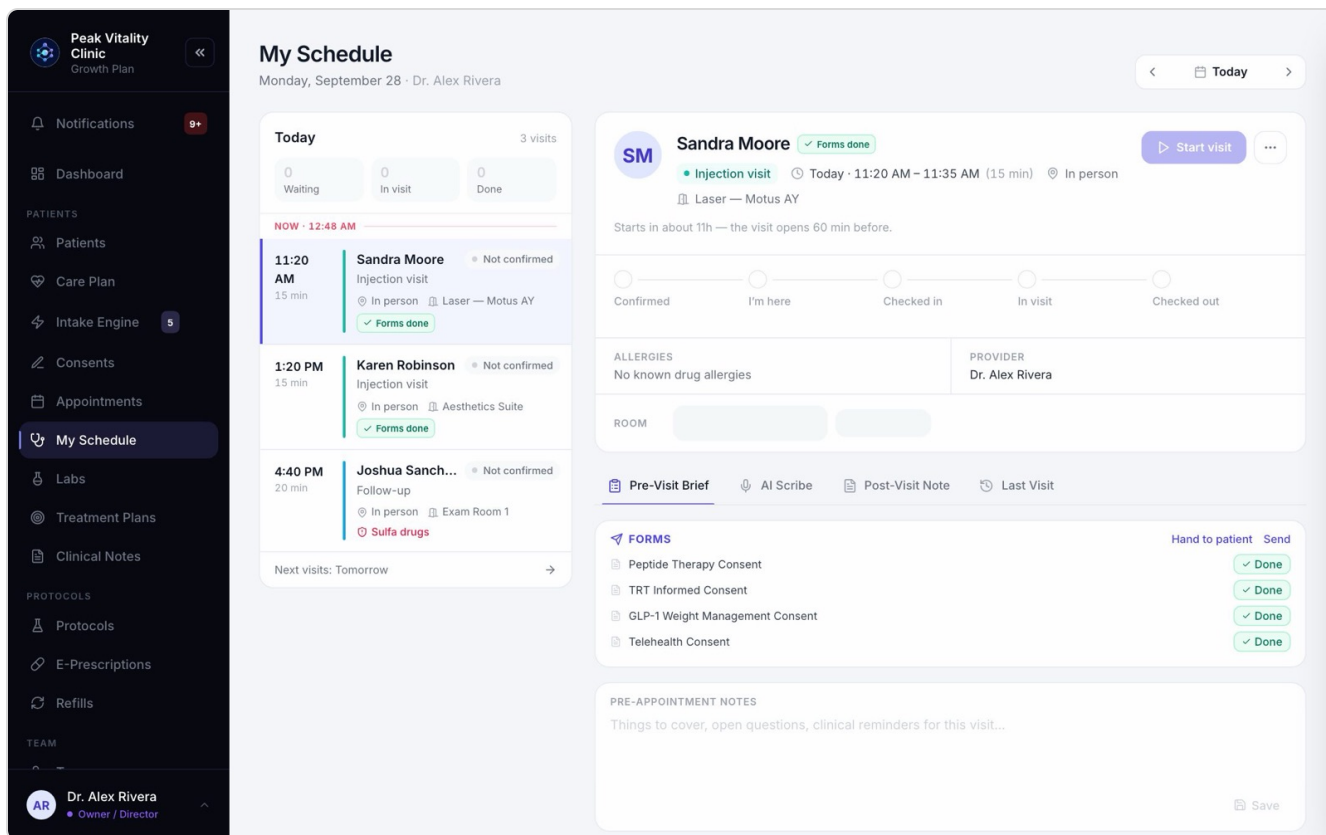
1. You land on the **Dashboard**. Your numbers are **My Patients, Active Protocols** and **Refills Pending**.
2. Under **Quick actions**, **New Prescription** starts a prescription when your plan includes e-prescribing.
3. The **Operations Queue** holds refills to approve, patients falling behind, and protocol renewals.
4. The first time, a welcome offers the tutorial. It shows only the pages your role uses.



Quick actions: the things you do most, one click away.

4. YOUR DAY ON MY SCHEDULE

1. Open **My Schedule**. Only your visits are listed, in time order.
2. When the front desk checks your patient in, a bar at the top tells you they're waiting. Press **Open visit**.
3. Press **Start visit**, or **Join Telehealth Call** for a video visit. Both open an hour before the visit.
4. When you're done, press **Check out**. Once it's over, **Book follow-up** books the next one.



My Schedule: your day on the left, the open visit on the right.

Tip. If My Schedule says you're not set up as a clinician, ask an owner or manager to tick **Sees patients** for you on Team.

5. BEFORE YOU GO IN

The **Pre-Visit Brief** tab has what to read first: alerts, allergies, conditions, the patient's protocol, their latest labs and refills running low.

The **Forms** card shows which forms are signed and which are still out, with **Send now** for anything missing.

Moore • Not confirmed

on visit

erson Laser — Motus AY

ms done

Robinson • Not confirmed

on visit

erson Aesthetics Suite

ms done

ia Sanch... • Not confirmed

-up

erson Exam Room 1

a drugs

→

Know before you walk in Add

Personal context — not part of the medical record.

Nothing yet — add what you would want to remember before the next visit.

Things to cover, open questions, clinical reminders for this visit...

Save

AGE / SEX	ADHERENCE	LAST VISIT
51 • Female	No protocol	—

ALLERGIES

NKDA

CONDITIONS

Pre-diabetes

LABS Comprehensive Metabolic Sep 14, 2026

1 result ready to review

Fasting Glucose	—	—
BUN	—	—
Creatinine	—	—
eGFR	—	—

LAST NOTE

Routine follow-up. Reports steady improvement since the last visit. • Stable and progressing as expected on the current protocol.

The patient brief: read it before you walk in.

6. THE VISIT NOTE

1. On an in-person visit, the **AI Scribe** tab records the visit and drafts the note, once the patient has agreed.
2. Write the note on **Post-Visit Note**. Add diagnosis codes under **ICD-10 Diagnosis Codes**.
3. **Save Draft** keeps it open. **Sign & Lock** makes it final and marks the visit completed.
4. Every note for every patient is also on **Clinical Notes**. A change to a signed note is added as an amendment.

Pre-Visit Brief AI Scribe **Post-Visit Note** Last Visit

3 visits

visit 0 Done

Moore • Not confirmed
on visit
Person Laser — Motus AY
ms done

Robinson • Not confirmed
on visit
Person Aesthetics Suite
ms done

Sanch... • Not confirmed
-up
Person Exam Room 1
a drugs

→

SUBJECTIVE
Patient's reported symptoms, concerns, and updates from today's visit...

OBJECTIVE
Vitals, exam findings, lab values reviewed...

ASSESSMENT
Clinical impression and diagnosis...

PLAN
Next steps, medication changes, follow-up instructions...

ICD-10 DIAGNOSIS CODES
e.g. E11.9 Add

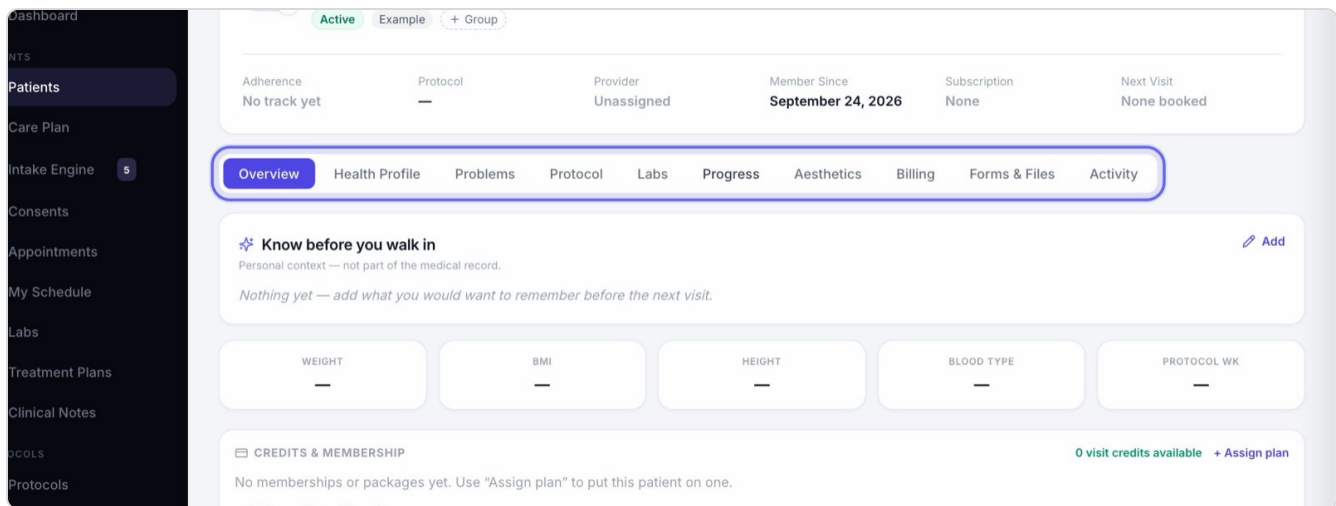
Authored by Dr. Alex Rivera

Save Draft Sign & Lock

Write the visit up, then save a draft or sign and lock it.

7. THE PATIENT'S CHART

1. On **Patients**, **All Patients** is the whole clinic. **My Patients** narrows it to the patients assigned to you.
2. Click a patient to open the chart. You see every tab: **Overview**, **Health Profile**, **Problems**, **Protocol**, **Labs**, **Progress** and the rest.
3. To put a patient on a plan after a visit, use **Care Plan**. It walks you from picking the patient to a signed plan in their app.



The chart's tabs. A provider sees all of them.

8. WRITE A PRESCRIPTION

1. On **E-Prescriptions**, click **New Prescription**.
2. Pick the patient and the drug, then the strength, quantity, days supply, refills and directions. The prescriber is always you.
3. Pick the pharmacy under **Destination**. The **Safety check** watches for allergies and duplicates as you type.
4. Press **Sign & send**, or **Save as Draft** to finish later.
5. Before your first one, open **Setup** on the same page. Each prescriber's setup has to be finished before they can send.

Peak Vitality Clinic
Growth Plan

Search patient, drug, or indication...

All 95 Active 86 Pending Refill Due Draft 9 Expired To dispense Controlled 13 Archived

Levothyroxine
Patricia Wright
75 mcg 3 Sent

Sermorelin
Lisa Brown
15 mg/vial 3 Sent

Levothyroxine
Karen Robinson
75 mcg 3 Sent

NAD+ Injection
Elliot Miller
100 mg/mL 3 Sent

NAD+ Injection
Kevin Allen
100 mg/mL 3 Sent

BPC-157
Grant Jones
500 mcg/mL 3 Sent

View all · showing 6 most recent

New Prescription

Patient *
Search by name or ID...

Prescriber
Dr. Alex Rivera

Drug *
Select or type a compound...

Strength *
— select or type a drug first —

Quantity *
e.g. 30

Days Supply
30

Refills
3

Destination *
Pharmacy Dispense in-house
Empower Pharmacy
Houston, TX

This pharmacy has no e-prescribing address on the network — pick it again from the search results, or send it by fax or phone.
Sent to this pharmacy once you sign.

Indication / Diagnosis *
e.g. Hypogonadism, weight management, longevity (off-label)...

Protocol (optional)
None

Sig (Dosing Instructions) *
Enter dosing instructions... 0/1000

Note to pharmacist (optional)
Anything the pharmacist needs to know

Goes to the pharmacist · 0/210

The prescription form: patient, drug, dose and pharmacy.

9. REFILLS

1. Open **Refills**. The queue puts what needs doing first at the top, with the days of supply left.
2. Open one and press **Sign to approve**, or **Decline**. Only people allowed to approve refills see these buttons.
3. Approving isn't sending. It still has to be signed and sent to the pharmacy, or phoned or faxed.
4. **Due soon, not requested** lists medicines running out in the next 14 days that nobody asked about yet.

Peak Vitality Clinic
Growth Plan

Notifications 9+

Dashboard

NTS

Patients

Care Plan

Intake Engine 5

Consents

Appointments

My Schedule

Labs

Treatment Plans

Clinical Notes

ocols

Protocols

E-Prescriptions

Refills

Dr. Alex Rivera
Owner / Director

All 93 Needs action 93 Awaiting signature Sent On hold Requests Due soon, not request

Refill Queue 93 refills

Q Search patients...

APPROVED — SOMEONE MUST SEND IT · 7

- Levi Lewis** Awaiting send
Testosterone Cypionate · 200 mg/mL
99d over
- Brian Flores** Awaiting send
Tirzepatide · 5 mg
53d over
- Miles Williams** Awaiting send
Semaglutide · 2.5 mg
79d over
- Nancy Torres** Awaiting send
Sermorelin · 0.3 mg
36d over
- Jennifer Lee** Awaiting send
NAD+ · 100 mg/mL
72d over
- Andrew Jackson** Expired
Anastrozole · 0.25 mg
88d over
- Giselle Moore** Awaiting send
BPC-157 · 250 mcg
94d over

REQUESTED · 12

Refill Details

Semaglutide Due
2.5 mg · Injectable · Qty 4 pens
Dr. Maya Chen Wyatt Anderson

ASKED FOR
A supply is running out. Nobody has asked for this yet.

Last fill 2026-06-17 Next due 2026-07-17

Supply left 73d overdue Pharmacy Tailor Made C

PRESSCRIPTION AUTHORIZATION
Refills remaining 1 / 1 Rx expires 2027-01-02

HOW THIS REACHES THE PATIENT
A supply is running out. Nobody has asked for the

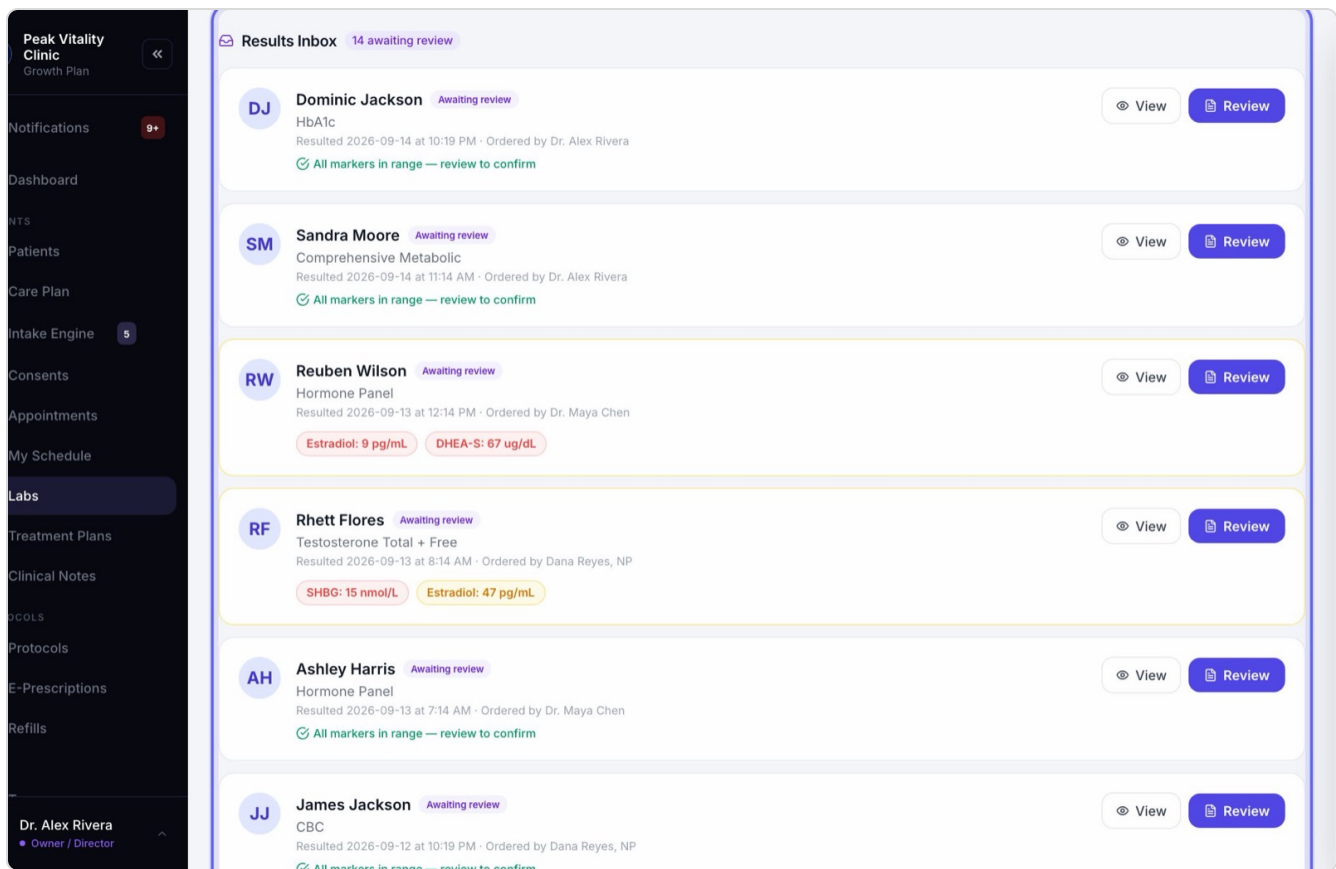
CLINICAL NOTES
Add a note about this refill...

Save note

The refill queue, most urgent first.

10. LABS

1. On **Labs**, press **Order labs**, pick the patient and the tests.
2. New results wait on the **Results Inbox** tab. They stay hidden from the patient until you release them.
3. Open a result to see each marker with its range. Out-of-range ones are flagged. Press **Review & Send** when it's ready.
4. As a provider, the list shows the labs you ordered.



Results to review: file each one, or release it to the patient.

11. ALSO YOURS

1. Create and edit **Protocols**, your treatment programs.
2. Send consents from **Consents** with **Send to patient**, or **Hand to patient** to sign on a tablet.
3. Take a payment at checkout. Refunds need someone who can see revenue.
4. **Close a day** on Appointments blocks new bookings for a day you're away.

12. WHAT YOUR ROLE CAN'T DO BY DEFAULT

1. **Billing, Analytics, Team, Staff Scheduling, Workflows, Communications**, the **HIPAA Audit Trail** and **Settings** belong to owners and managers.
2. You can look at visit types and copy the booking link, but only an owner or manager can change them.
3. In **Intake Engine** you can preview the forms and read what patients send in. Building a form is an owner's or manager's job.
4. An owner can change what your role can do in **Settings → Roles & Permissions**.