Settings

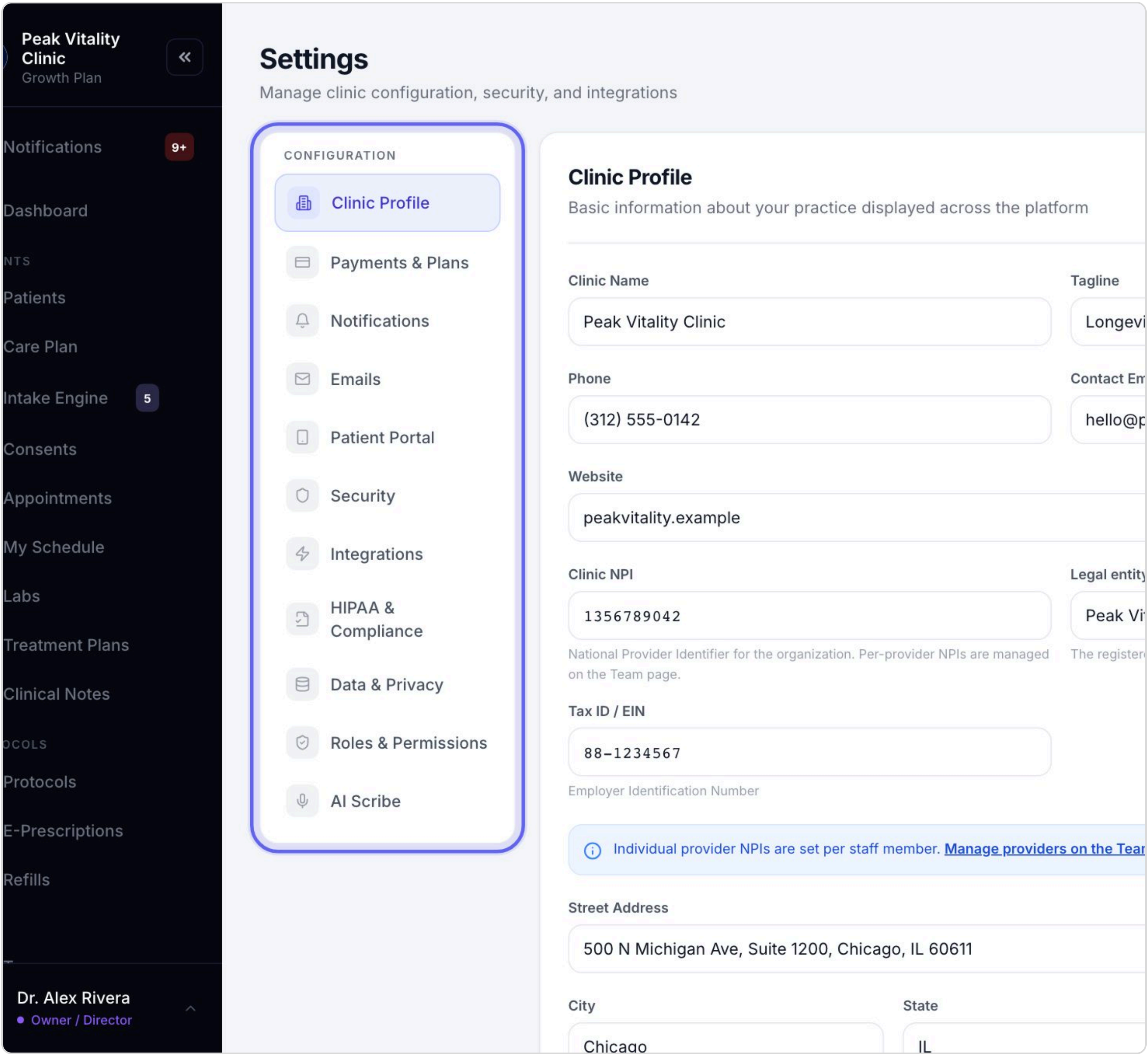
How your clinic runs: your details and hours, payments, what patients are told, the patient app, security, connected tools and who can do what.

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

1. THE PAGE AT A GLANCE

Settings holds everything about how your clinic runs. The topics are listed on the left. Click one to open it on the right.

Only owners and managers can open Settings. Most changes save on their own a moment after you make them. Where a topic has a **Save Changes** button at the top, you can press it to be sure.



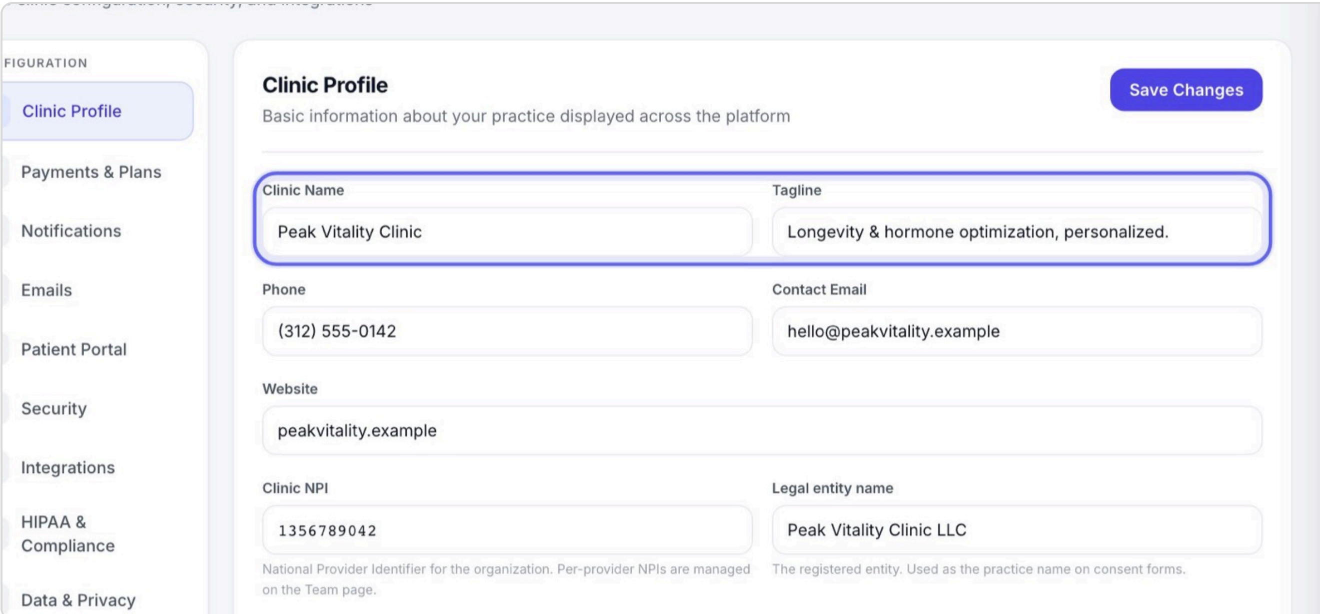
Every setting, grouped by topic down the left side.

Tip. Settings opens on the topic you last had open, on this computer.

2. CLINIC PROFILE

Your clinic’s name, phone, email, website and address, your clinic NPI, legal name and tax ID, your **Timezone**, and your **Business Hours**. It is also where you add your **Locations** and your lab targets.

The clinic profile setup guide walks through each part.

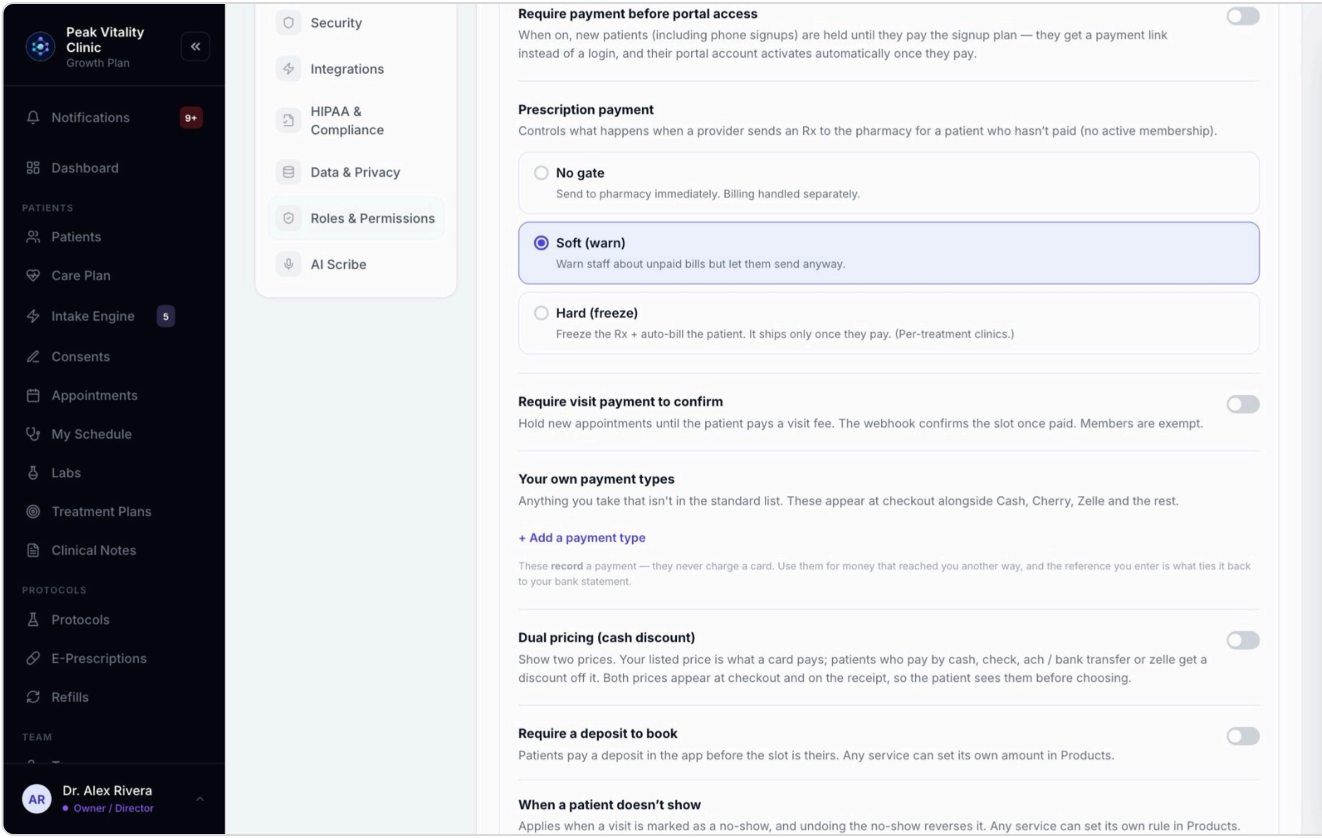


Clinic Profile starts with your clinic's name and tagline.

3. PAYMENTS & PLANS

Connect your card processor and add your card terminals. Below that are your payment rules: what patients pay up front, deposits, no-show fees, a cash price, and your own payment types.

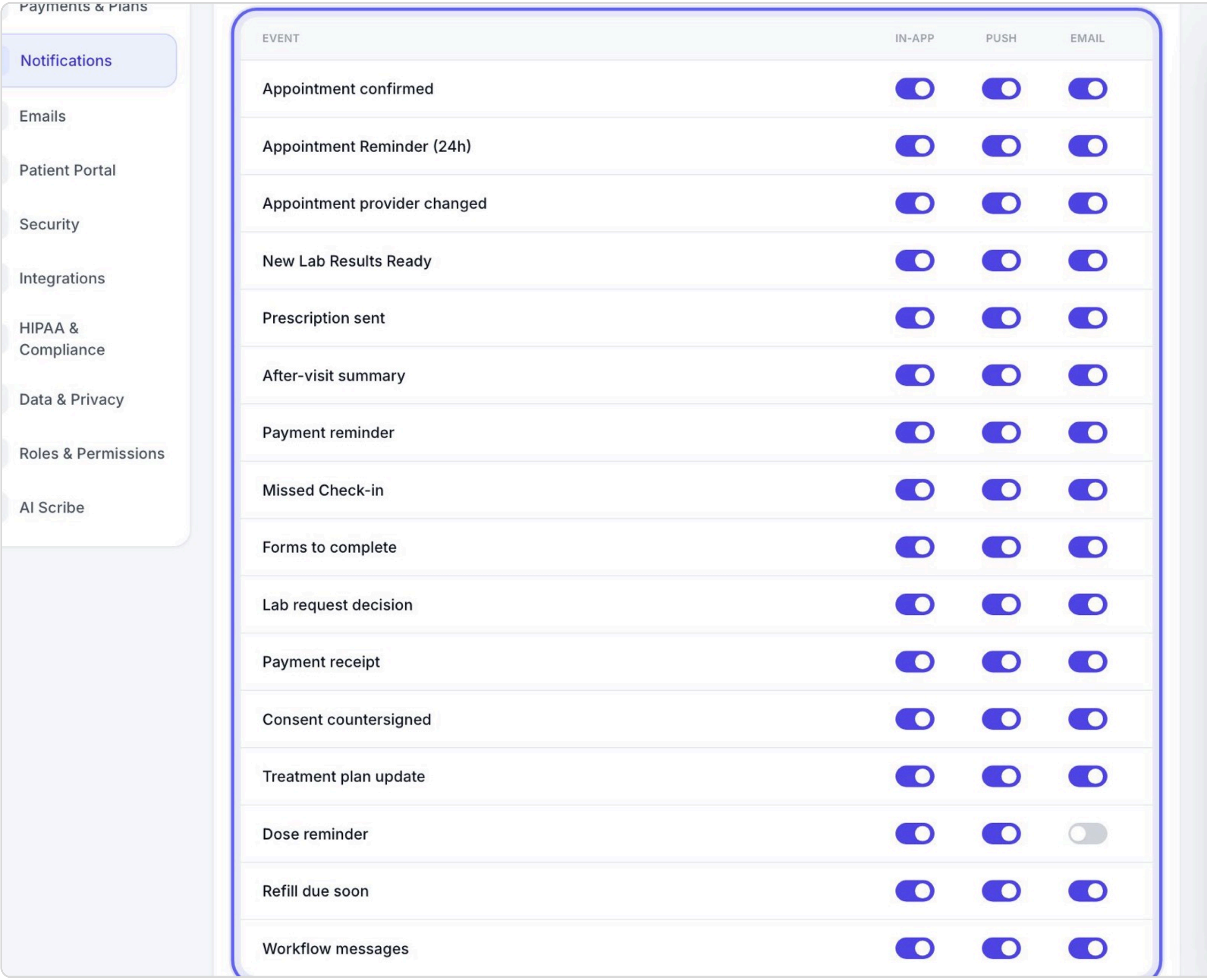
At the bottom, under **Invoices & claims**, are the billing details printed on invoices and claims. The card payments setup guide covers all of it.



Payments & Plans: your payment rules.

4. NOTIFICATIONS

1. The first table is what patients are told. For each event, like **Appointment confirmed** or **New Lab Results Ready**, switch **In-App**, **Push** and **Email** on or off.
2. **Staff notifications** is what your team is told. Everything lands in the staff bell. Switch off a push to stop it buzzing their phones.
3. **Waiting room alert** tells the front desk when a patient has waited this many minutes without being taken to a room. Type the minutes and press **Save**.



What patients are told, and how: in the app, on their phone, or by email.

Tip. Texts aren't sent. Reminders like a refill coming due are set up on the Workflows page.

5. EMAILS

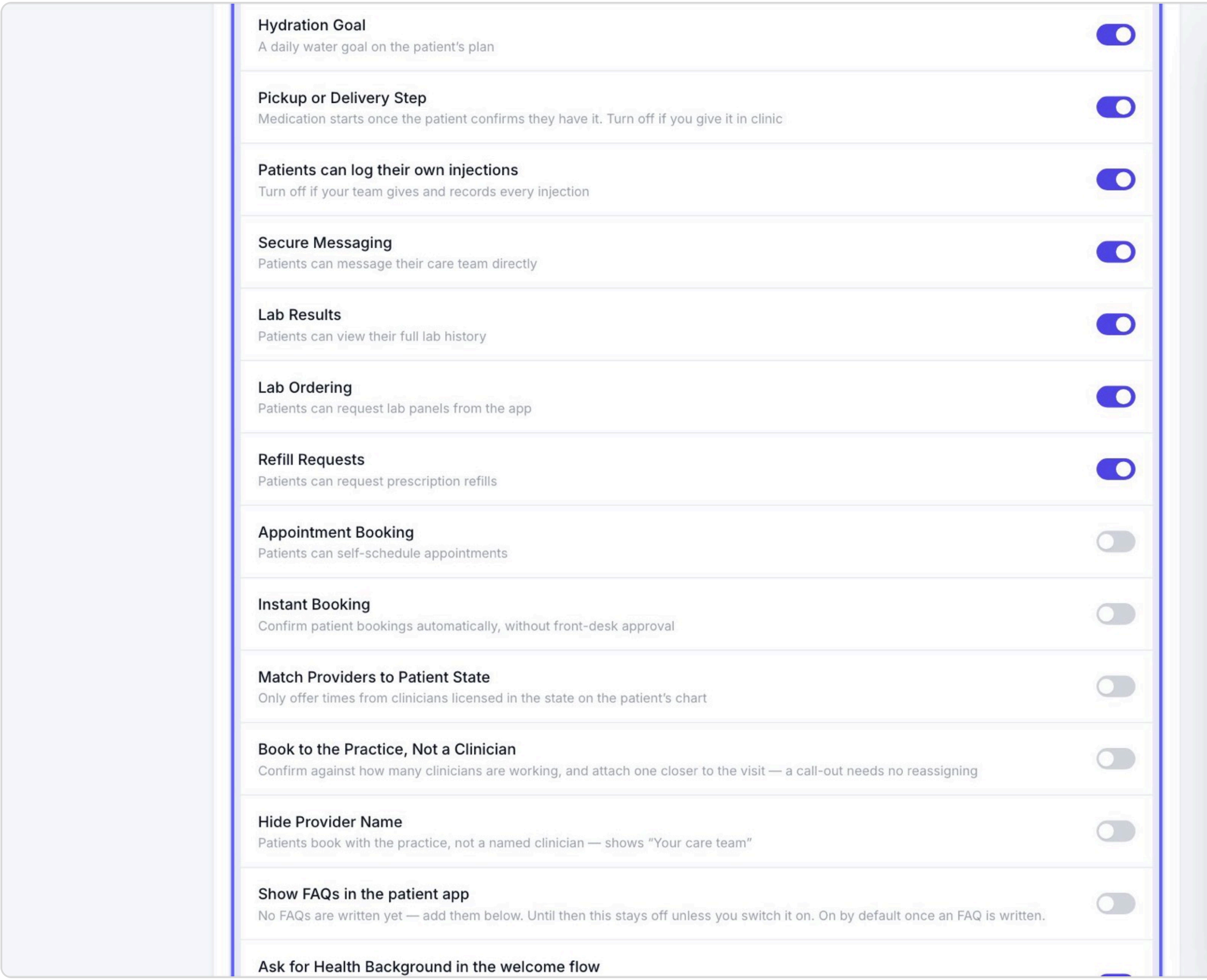
Every automatic email your patients get. It shows first whether your emails are arriving, and if not, why.

Below that is each email, with a preview of what the patient sees. You can change its **Subject line**, **A line above the message**, and its **Sign-off**.

6. PATIENT PORTAL

1. **Patient Access Code** is the code patients type to join your clinic in the app. Copy it to share. Changing it locks it for 60 days, so choose carefully.
2. **Portal Features** turns app features on or off, like **Secure Messaging**, **Lab Results**, **Refill Requests** and **Appointment Booking**.
3. Write **Frequently asked questions** for the app's FAQs page, and switch on **Show FAQs in the patient app**.

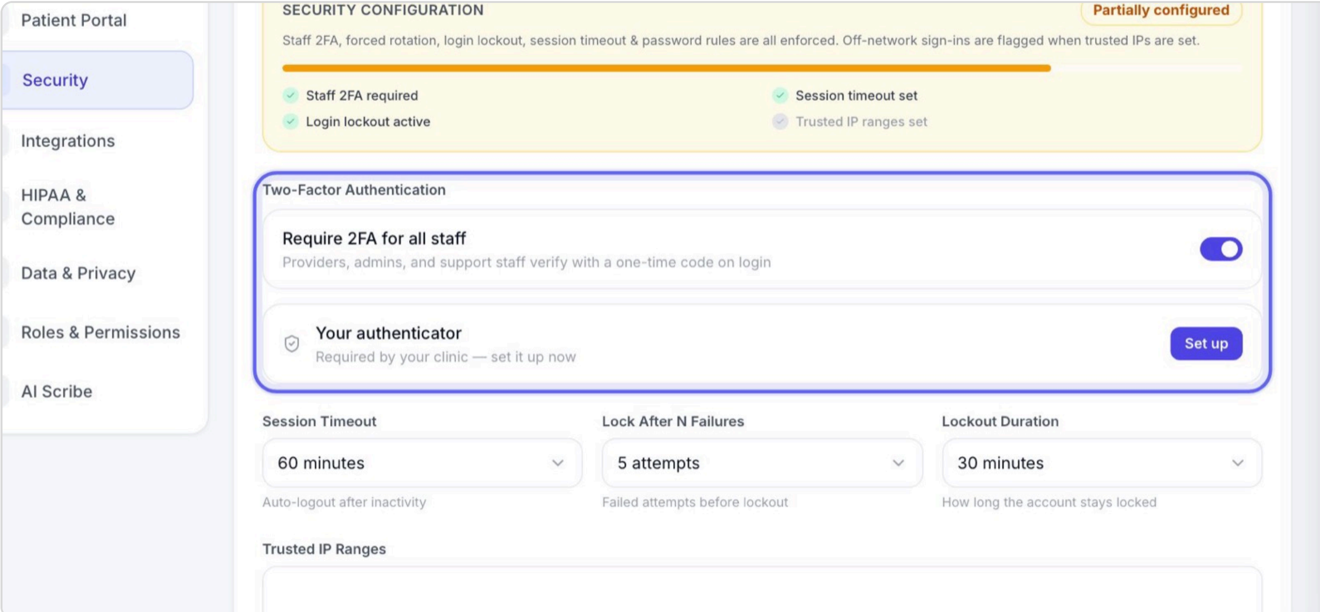
4. Set the **Appointment Reminder** time and the **Check-in Reminder Delay**.
5. The **Progress page** card sets what patients see on their progress page.



Portal Features: what patients can do in your app.

7. SECURITY

1. **Require 2FA for all staff** makes everyone enter a code from an app on their phone when they sign in. **Your authenticator** is where you set up your own.
2. Set the **Session Timeout**: how long Aminova waits before signing an idle computer out.
3. Set **Lock After N Failures** and the **Lockout Duration** for wrong passwords.
4. Add **Trusted IP Ranges** for your office. Sign-ins from anywhere else are flagged, and **Office-only roles** can't sign in from anywhere else at all.
5. Set your **Password Policy**: length, how often it changes, and what it must contain.

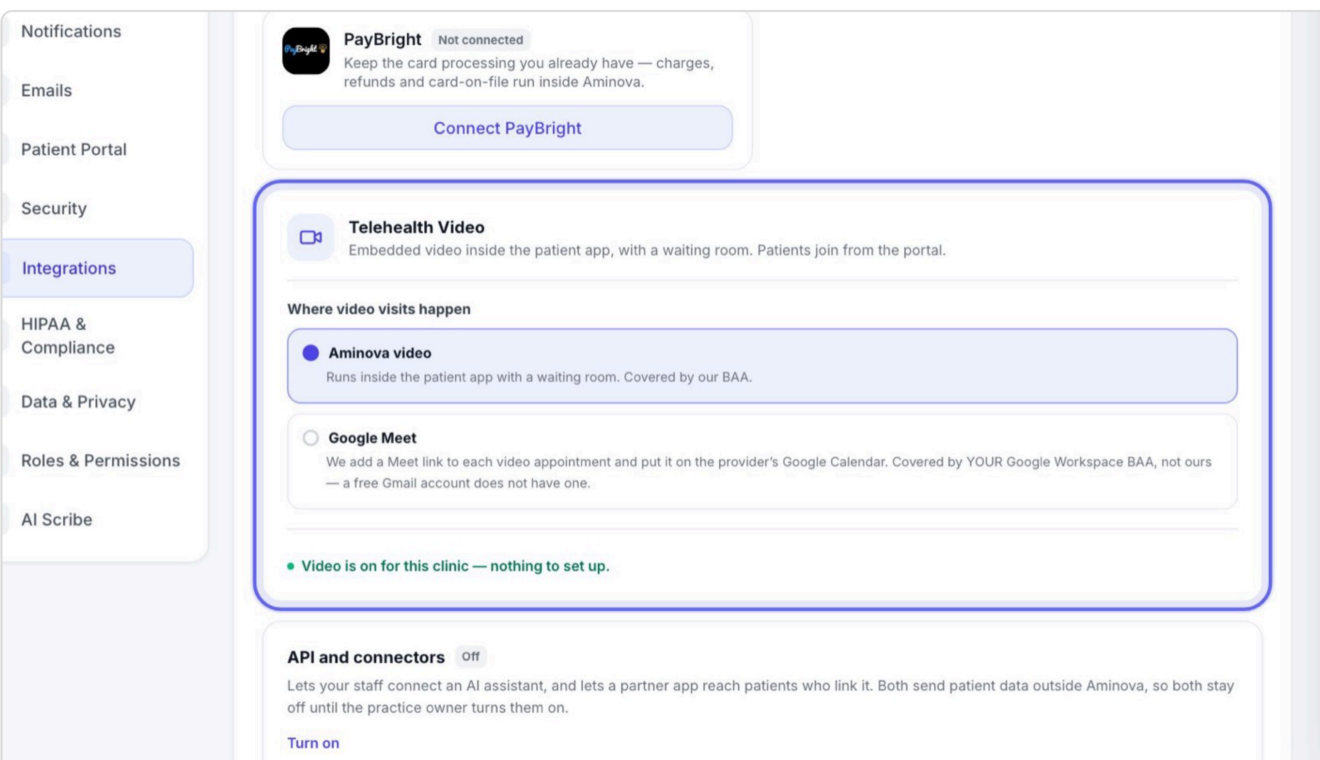


Two-step sign-in for your whole team, and your own authenticator below it.

8. INTEGRATIONS

The **Telehealth Video** card is where you choose where video visits happen. The video visits setup guide explains the choice.

Press **Add app** to add an outside tool your clinic already uses, like your accounting software, then connect it on its card.

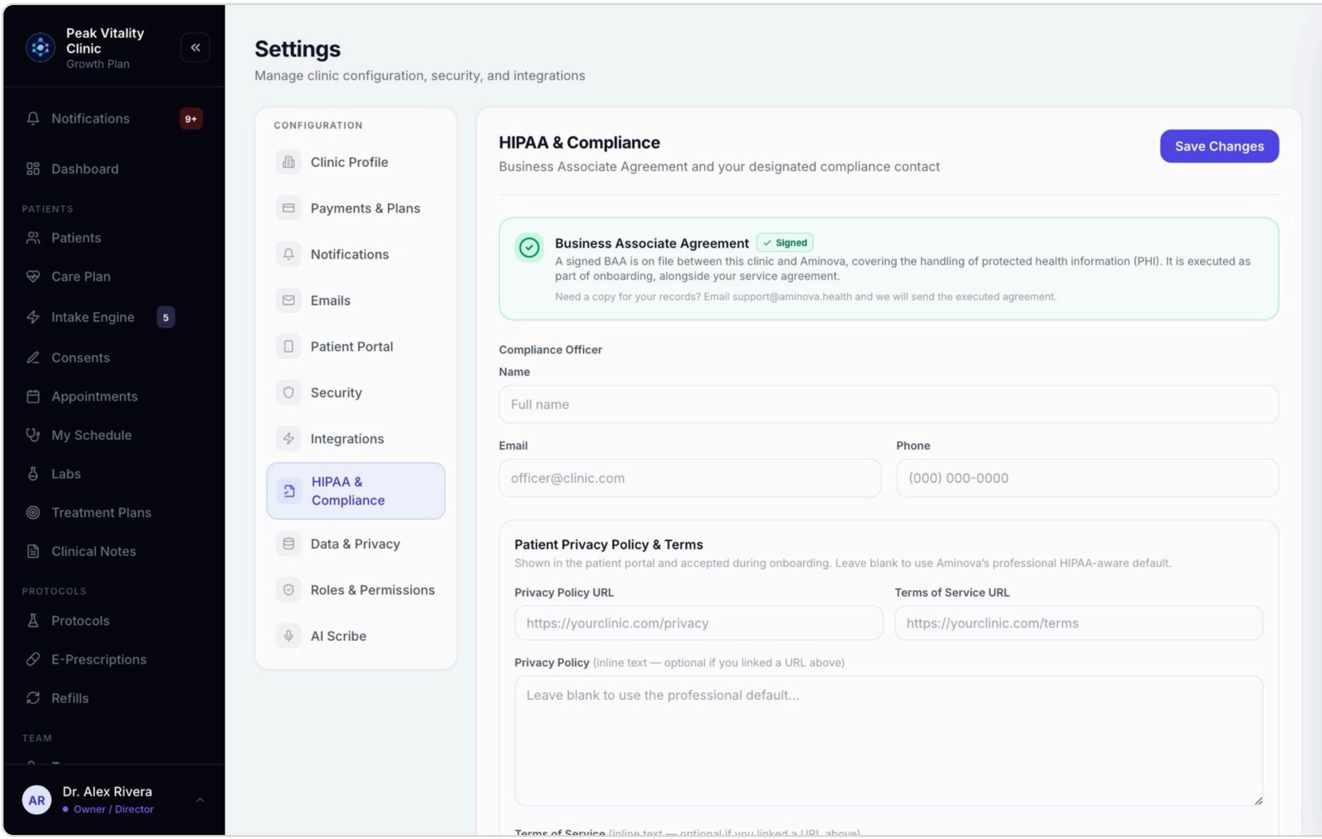


Telehealth Video: where your video visits happen.

9. HIPAA & COMPLIANCE

Your **Business Associate Agreement** with Aminova: the privacy contract that covers your patients' information. It is signed when you join. Below it is your **Compliance Officer**: the name, email and phone of the person in charge of privacy.

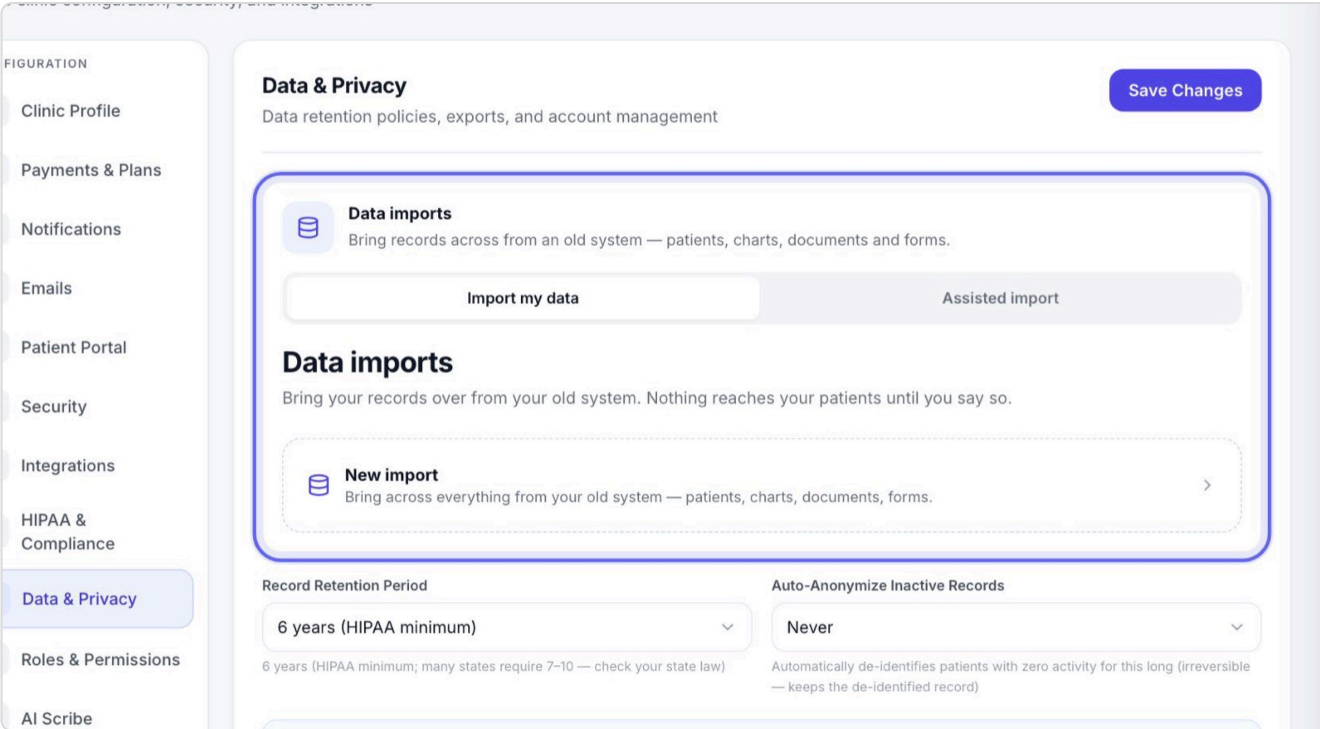
Add your **Privacy Policy URL** and **Terms of Service URL**, or paste the text. **View Audit Trail** opens the HIPAA Audit Trail.



HIPAA & Compliance: your agreement, your compliance officer and your policies.

10. DATA & PRIVACY

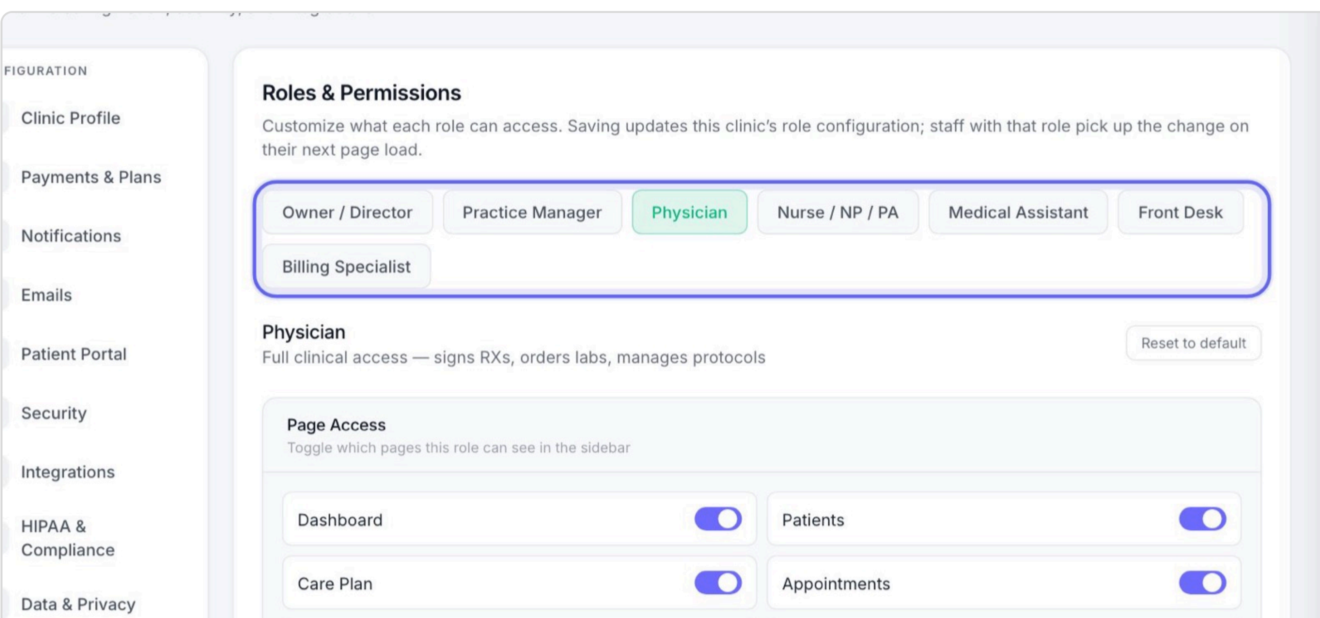
1. **Data imports** brings patients, charts, documents and forms over from your old system.
2. Choose your **Record Retention Period**. Check your state's law: many ask for more than six years.
3. **Auto-Anonymize Inactive Records** removes the details that identify a patient once they've had no activity at all for that long. It can't be undone. Leave it on **Never** unless you're sure.
4. **Export All Clinic Data** downloads your patients, appointments, invoices and subscriptions.



Data imports: bring your old records in.

11. ROLES & PERMISSIONS

1. Pick a role at the top.
2. Under **Page Access**, choose which pages it sees in the sidebar.
3. Under **Feature Access**, choose which actions it can take.
4. Press **Save Permission Changes**.



Pick a role, then choose the pages and actions it gets.

Tip. The Owner role always has full access and can't be limited. To limit someone, give them a different role.

12. AI SCRIBE

If your clinic has the AI scribe, this is where each provider sets how their own visit notes are written. It changes only your notes, not anyone else's. How long visit recordings are kept is set here too, for the whole clinic.