

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.

Peak Vitality Clinic
Growth Plan

Notifications 9+

Dashboard

INTENTS

Patients

Care Plan

Intake Engine 5

Consents

Appointments

My Schedule

Labs

Treatment Plans

Clinical Notes

PROTOCOLS

Protocols

E-Prescriptions

Refills

Dr. Alex Rivera
Owner / Director

Settings

Manage clinic configuration, security, and integrations

CONFIGURATION

- Clinic Profile
- Payments & Plans
- Notifications
- Emails
- Patient Portal
- Security
- Integrations
- HIPAA & Compliance
- Data & Privacy
- Roles & Permissions
- AI Scribe

Clinic Profile

Basic information about your practice displayed across the platform

Clinic Name: Peak Vitality Clinic

Tagline: Longevity

Phone: (312) 555-0142

Contact Email: hello@peakvitality.com

Website: peakvitality.example

Clinic NPI: 1356789042

Legal entity: Peak Vitality

National Provider Identifier for the organization. Per-provider NPIs are managed on the Team page. The registered organization is the legal entity.

Tax ID / EIN: 88-1234567

Employer Identification Number

Individual provider NPIs are set per staff member. [Manage providers on the Team page.](#)

Street Address: 500 N Michigan Ave, Suite 1200, Chicago, IL 60611

City: Chicago

State: IL

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.

FIGURATION

Clinic Profile

Payments & Plans

Notifications

Emails

Patient Portal

Security

Integrations

HIPAA & Compliance

Data & Privacy

Clinic Profile

Save Changes

Basic information about your practice displayed across the platform

Clinic Name

Peak Vitality Clinic

Tagline

Longevity & hormone optimization, personalized.

Phone

(312) 555-0142

Contact Email

hello@peakvitality.example

Website

peakvitality.example

Clinic NPI

1356789042

Legal entity name

Peak Vitality Clinic LLC

National Provider Identifier for the organization. Per-provider NPIs are managed on the Team page.

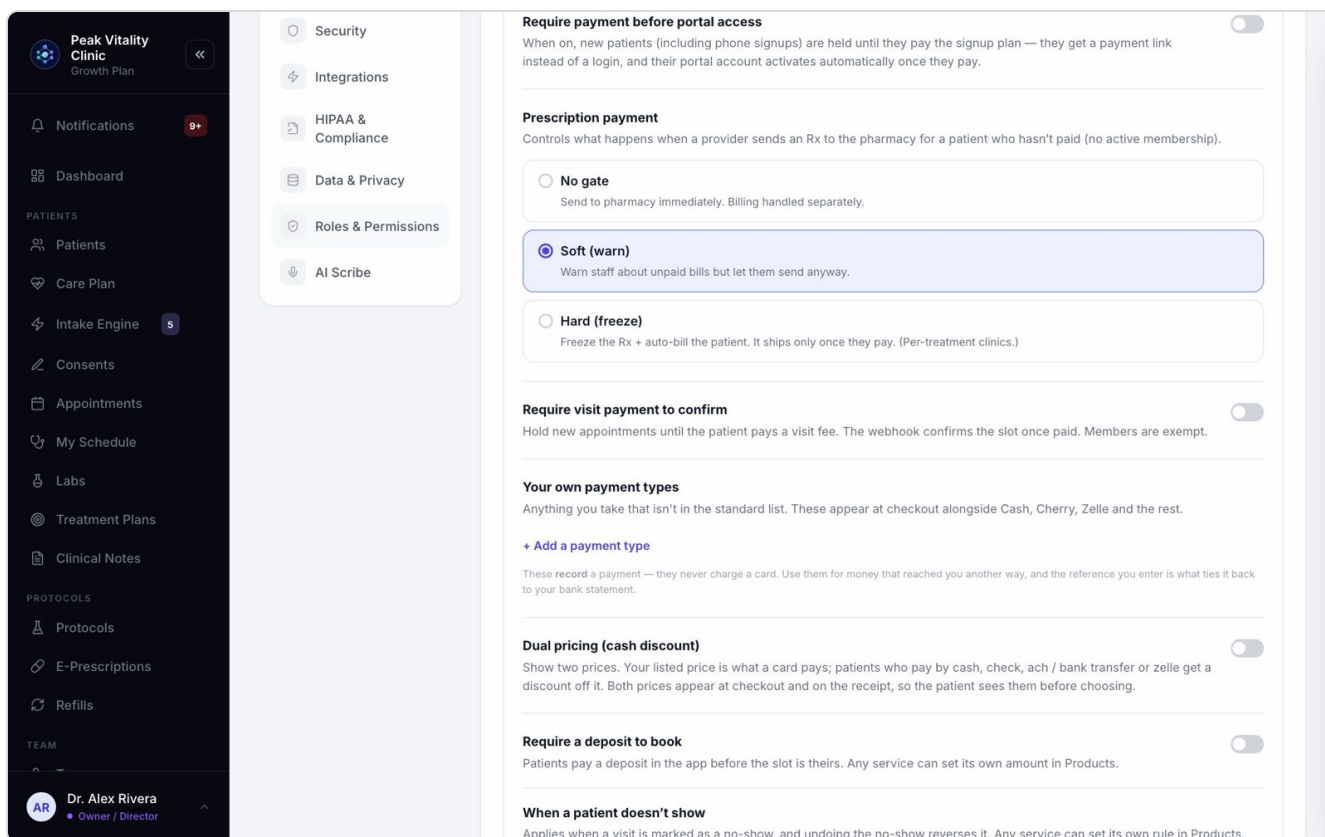
The registered entity. Used as the practice name on consent forms.

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**.

Payments & Plans				
Notifications				
Emails				
Patient Portal				
Security				
Integrations				
HIPAA & Compliance				
Data & Privacy				
Roles & Permissions				
AI Scribe				

EVENT	IN-APP	PUSH	EMAIL
Appointment confirmed	☒	☒	☒
Appointment Reminder (24h)	☒	☒	☒
Appointment provider changed	☒	☒	☒
New Lab Results Ready	☒	☒	☒
Prescription sent	☒	☒	☒
After-visit summary	☒	☒	☒
Payment reminder	☒	☒	☒
Missed Check-in	☒	☒	☒
Forms to complete	☒	☒	☒
Lab request decision	☒	☒	☒
Payment receipt	☒	☒	☒
Consent countersigned	☒	☒	☒
Treatment plan update	☒	☒	☒
Dose reminder	☒	☒	☐
Refill due soon	☒	☒	☒
Workflow messages	☒	☒	☒

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.

Hydration Goal A daily water goal on the patient's plan	☒
Pickup or Delivery Step Medication starts once the patient confirms they have it. Turn off if you give it in clinic	☒
Patients can log their own injections Turn off if your team gives and records every injection	☒
Secure Messaging Patients can message their care team directly	☒
Lab Results Patients can view their full lab history	☒
Lab Ordering Patients can request lab panels from the app	☒
Refill Requests Patients can request prescription refills	☒
Appointment Booking Patients can self-schedule appointments	☐
Instant Booking Confirm patient bookings automatically, without front-desk approval	☐
Match Providers to Patient State Only offer times from clinicians licensed in the state on the patient's chart	☐
Book to the Practice, Not a Clinician Confirm against how many clinicians are working, and attach one closer to the visit — a call-out needs no reassigning	☐
Hide Provider Name Patients book with the practice, not a named clinician — shows "Your care team"	☐
Show FAQs in the patient app No FAQs are written yet — add them below. Until then this stays off unless you switch it on. On by default once an FAQ is written.	☐
Ask for Health Background in the welcome flow	☐

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.

SECURITY CONFIGURATION Partially configured

Staff 2FA, forced rotation, login lockout, session timeout & password rules are all enforced. Off-network sign-ins are flagged when trusted IPs are set.

- ✓ Staff 2FA required
- ✓ Login lockout active
- ✓ Session timeout set
- ✗ Trusted IP ranges set

Two-Factor Authentication

Require 2FA for all staff Providers, admins, and support staff verify with a one-time code on login ☒

Your authenticator Required by your clinic — set it up now [Set up](#)

Session Timeout Auto-logout after inactivity

Lock After N Failures Failed attempts before lockout

Lockout Duration How long the account stays locked

Trusted IP Ranges

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.

Integrations

PayBright Not connected

Keep the card processing you already have — charges, refunds and card-on-file run inside Aminova.

[Connect PayBright](#)

Telehealth Video

Embedded video inside the patient app, with a waiting room. Patients join from the portal.

Where video visits happen

- ☒ **Aminova video**
Runs inside the patient app with a waiting room. Covered by our BAA.
- ☐ **Google Meet**
We add a Meet link to each video appointment and put it on the provider's Google Calendar. Covered by YOUR Google Workspace BAA, not ours — a free Gmail account does not have one.

• Video is on for this clinic — nothing to set up.

API and connectors Off

Lets your staff connect an AI assistant, and lets a partner app reach patients who link it. Both send patient data outside Aminova, so both stay off until the practice owner turns them on.

[Turn on](#)

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.

The screenshot shows the 'Settings' page for 'Peak Vitality Clinic'. The left sidebar contains navigation links: Notifications, Dashboard, PATIENTS (Patients, Care Plan, Intake Engine, Consents, Appointments, My Schedule, Labs, Treatment Plans, Clinical Notes), PROTOCOLS (Protocols, E-Prescriptions, Refills), and TEAM (Dr. Alex Rivera, Owner / Director). The main content area is titled 'Settings' with the subtitle 'Manage clinic configuration, security, and integrations'. A 'CONFIGURATION' sidebar lists: Clinic Profile, Payments & Plans, Notifications, Emails, Patient Portal, Security, Integrations, HIPAA & Compliance (selected), Data & Privacy, Roles & Permissions, and AI Scribe. The 'HIPAA & Compliance' section includes a 'Save Changes' button, a 'Business Associate Agreement' status (Signed), a 'Compliance Officer' form (Name, Full name, Email, Phone), and a 'Patient Privacy Policy & Terms' section with fields for 'Privacy Policy URL', 'Terms of Service URL', and a text area for 'Privacy Policy'.

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.

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- HIPAA & Compliance
- Data & Privacy**
- Roles & Permissions
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Data & Privacy

Data retention policies, exports, and account management

[Save Changes](#)

Data imports

Bring records across from an old system — patients, charts, documents and forms.

Import my data Assisted import

Data imports

Bring your records over from your old system. Nothing reaches your patients until you say so.

New import

Bring across everything from your old system — patients, charts, documents, forms.

Record Retention Period

6 years (HIPAA minimum)

6 years (HIPAA minimum; many states require 7–10 — check your state law)

Auto-Anonymize Inactive Records

Never

Automatically de-identifies patients with zero activity for this long (irreversible — keeps the de-identified record)

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**.

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Roles & Permissions

Customize what each role can access. Saving updates this clinic's role configuration; staff with that role pick up the change on their next page load.

Owner / Director Practice Manager **Physician** Nurse / NP / PA Medical Assistant Front Desk

Billing Specialist

Physician

Full clinical access — signs RXs, orders labs, manages protocols

[Reset to default](#)

Page Access

Toggle which pages this role can see in the sidebar

Dashboard	☒	Patients	☒
Care Plan	☒	Appointments	☒

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.