Team

Everyone who works at your clinic. Invite people, give each a role, keep their credentials up to date, and remove someone who has left.

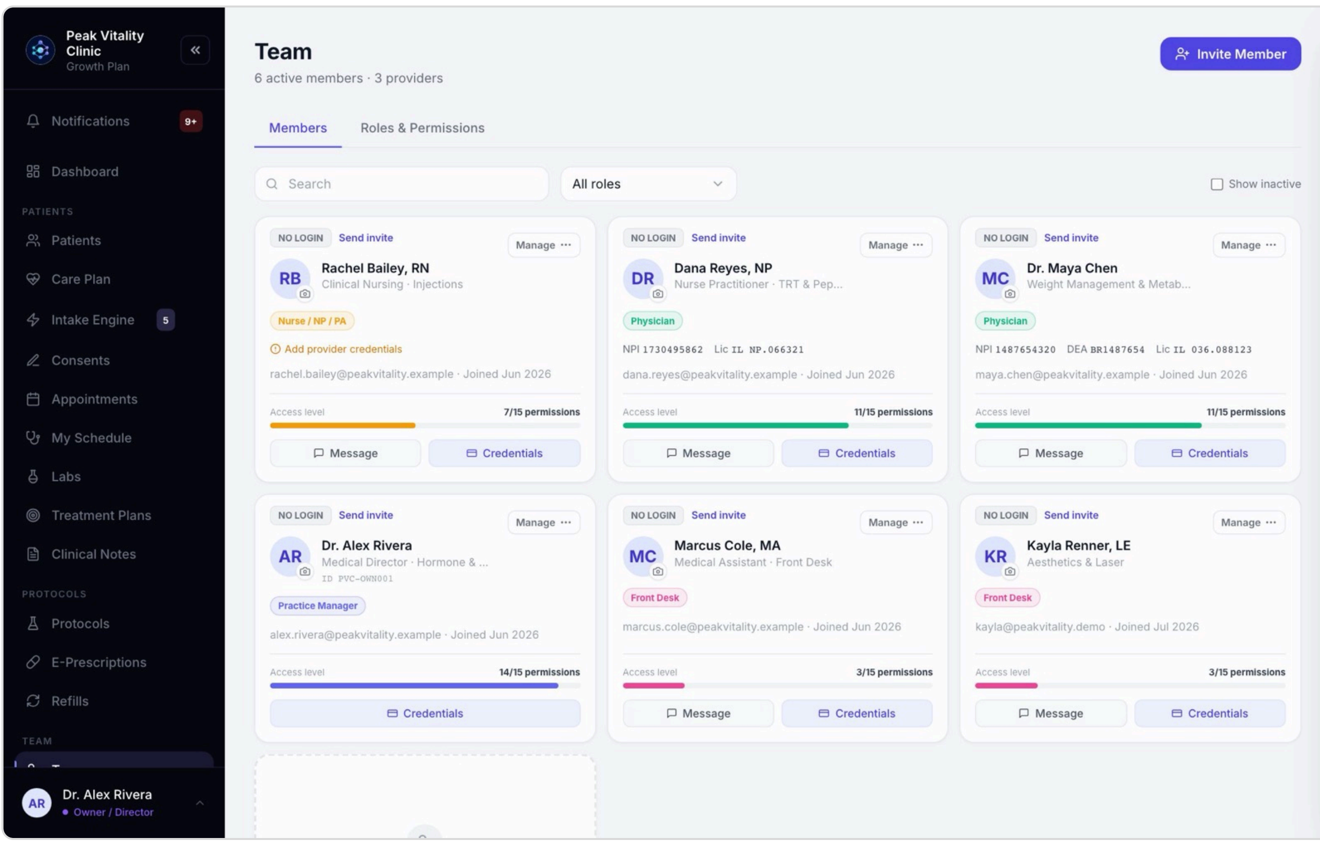
Page manual · For Owners, Managers · aminova.health/university/team

1. THE PAGE AT A GLANCE

Team lists everyone at your clinic, one card per person. Under the title you see how many active members and providers you have.

There are two tabs. **Members** is your staff list. **Roles & Permissions** shows what each role is allowed to do.

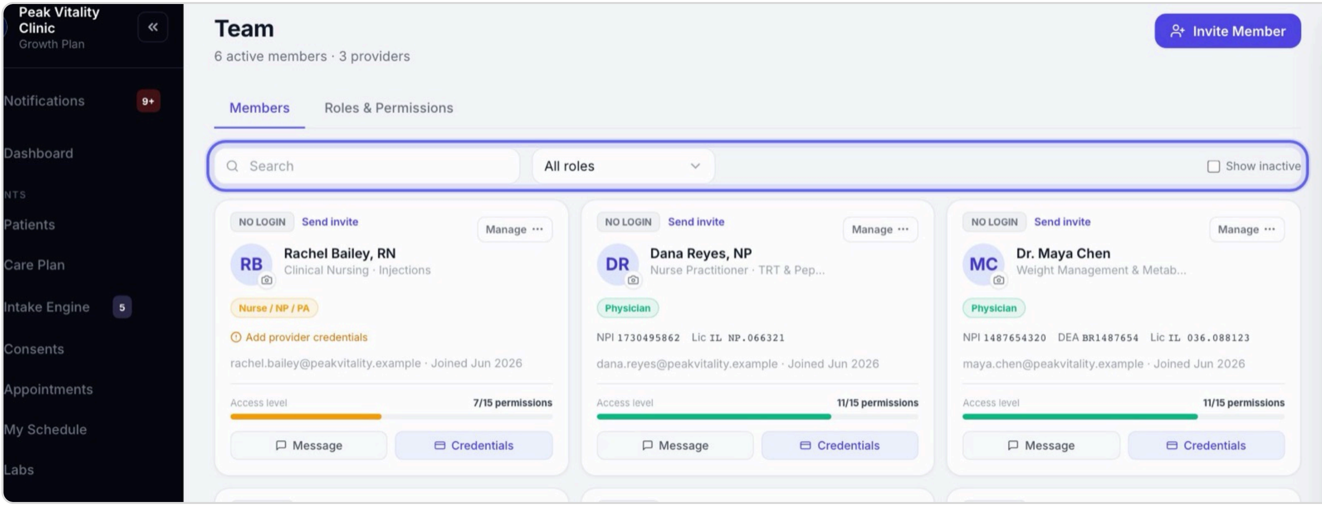
By default, only owners and managers see this page. What you can change here depends on your role.



The Team page, on the Members tab.

2. FIND SOMEONE

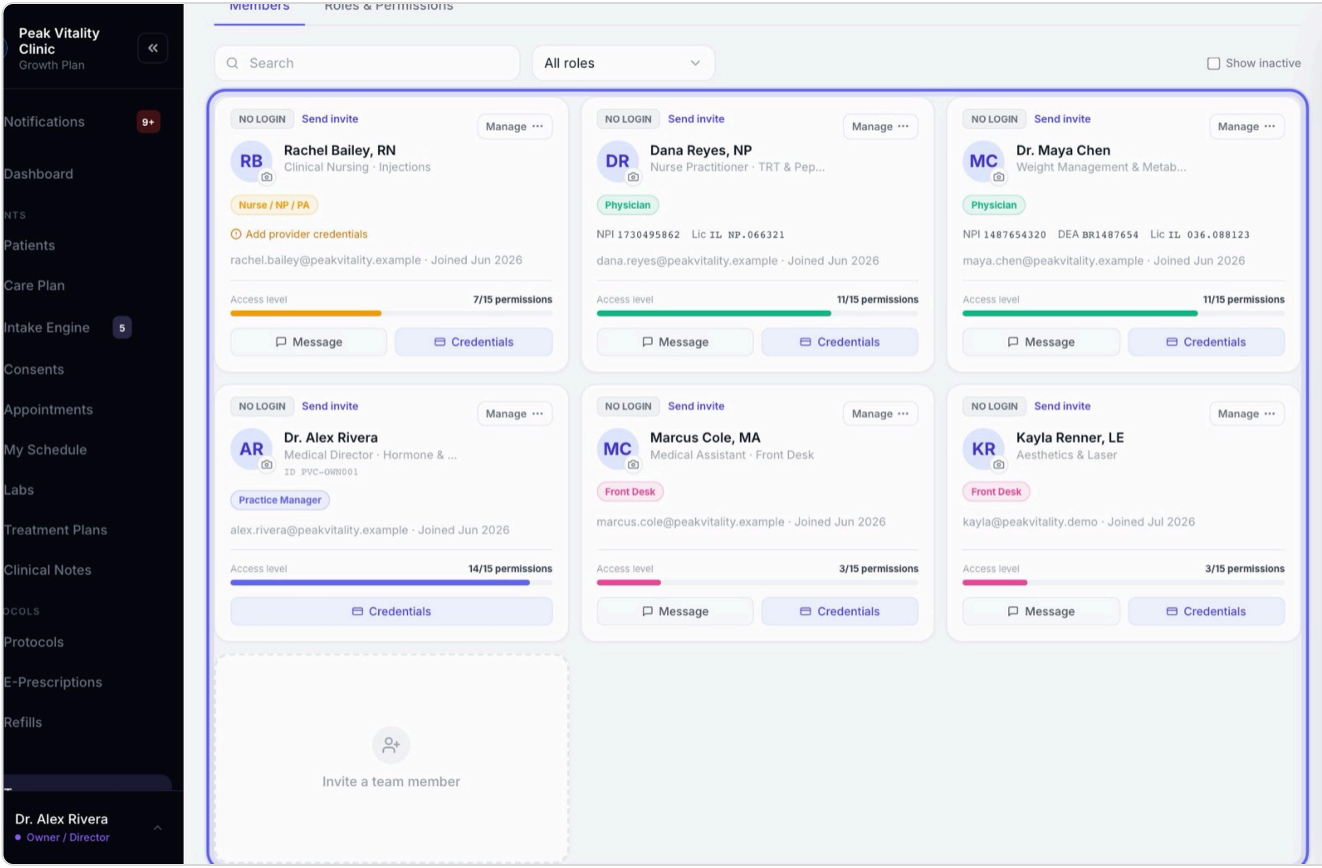
1. Type in **Search** to find a person by name or email.
2. Click **All roles** to show one role only, like Front Desk.
3. Tick **Show inactive** to also see people you deactivated.



Search, the role filter and Show inactive.

3. WHAT A CARD SHOWS

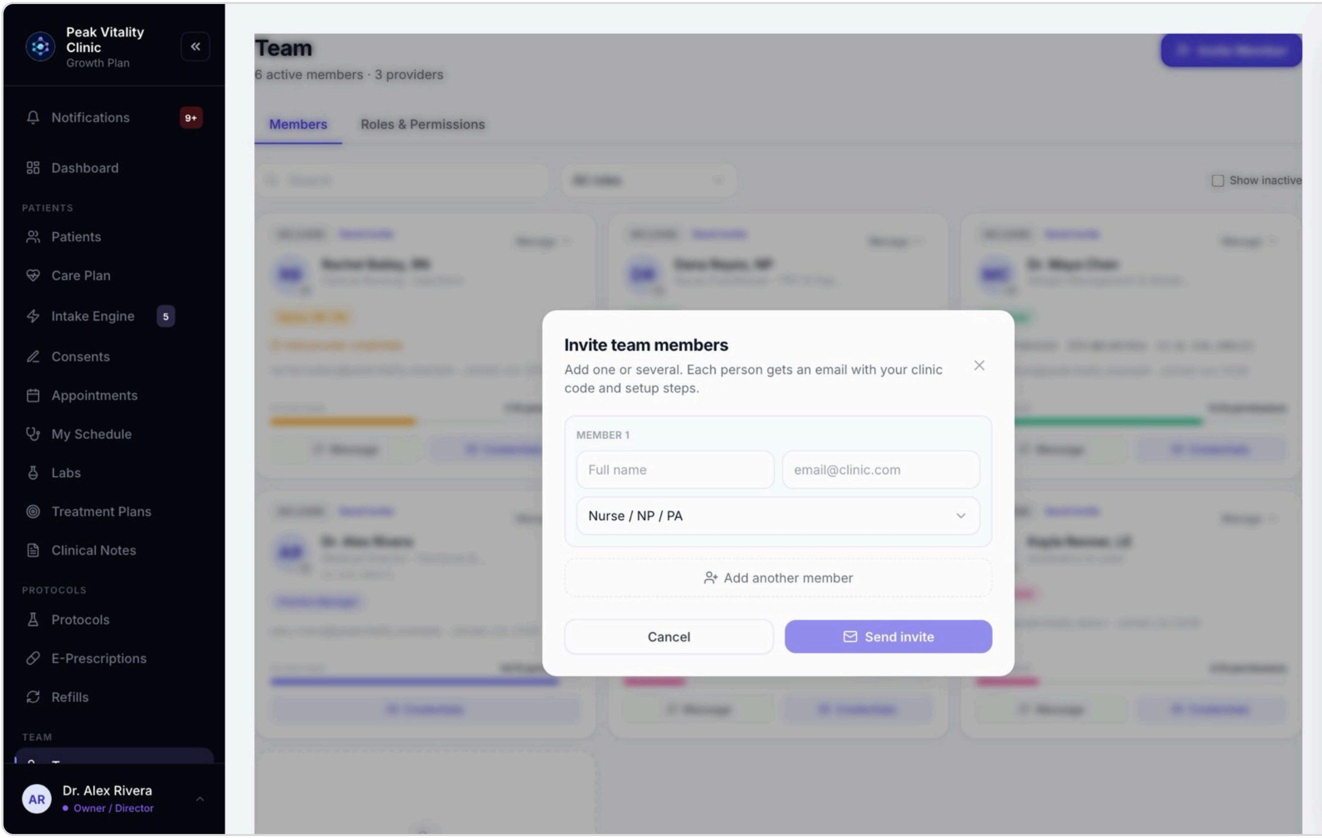
1. The photo, name, title and their team member ID. Press the photo to add or change it.
2. Their role, in a colored tag. A **License expired** or **License expires in** tag warns you when a license is running out.
3. For physicians and nurses, their NPI, DEA and license number. If none are on file, you see **Add provider credentials**.
4. Their email and the month they joined.
5. **Message** opens a chat with them. **Credentials** opens their details.
6. Owners also see an **Access level** bar: how many permissions this role has.



One card per person. Owners and providers come first.

4. INVITE PEOPLE

1. Click **Invite Member**, or the **Invite a team member** card at the end of the list.
2. Type their **Full name** and email, and pick their role.
3. To invite more than one person, click **Add another member**.
4. Press **Send invite**. Each person gets an email with your clinic code and how to set up their login.



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

Tip. Only an owner can invite another owner. The Invite your team setup guide walks through it step by step.

5. PEOPLE WHO CAN'T SIGN IN YET

1. A **NO LOGIN** tag means the person is on your team but has no login yet. This is common after you bring staff over from another system.
2. Click **Send invite** beside the tag. Check the name and email, then press **Send invite** again. Nothing is sent until you do.
3. The tag changes to **INVITE SENT** until they finish setting up.

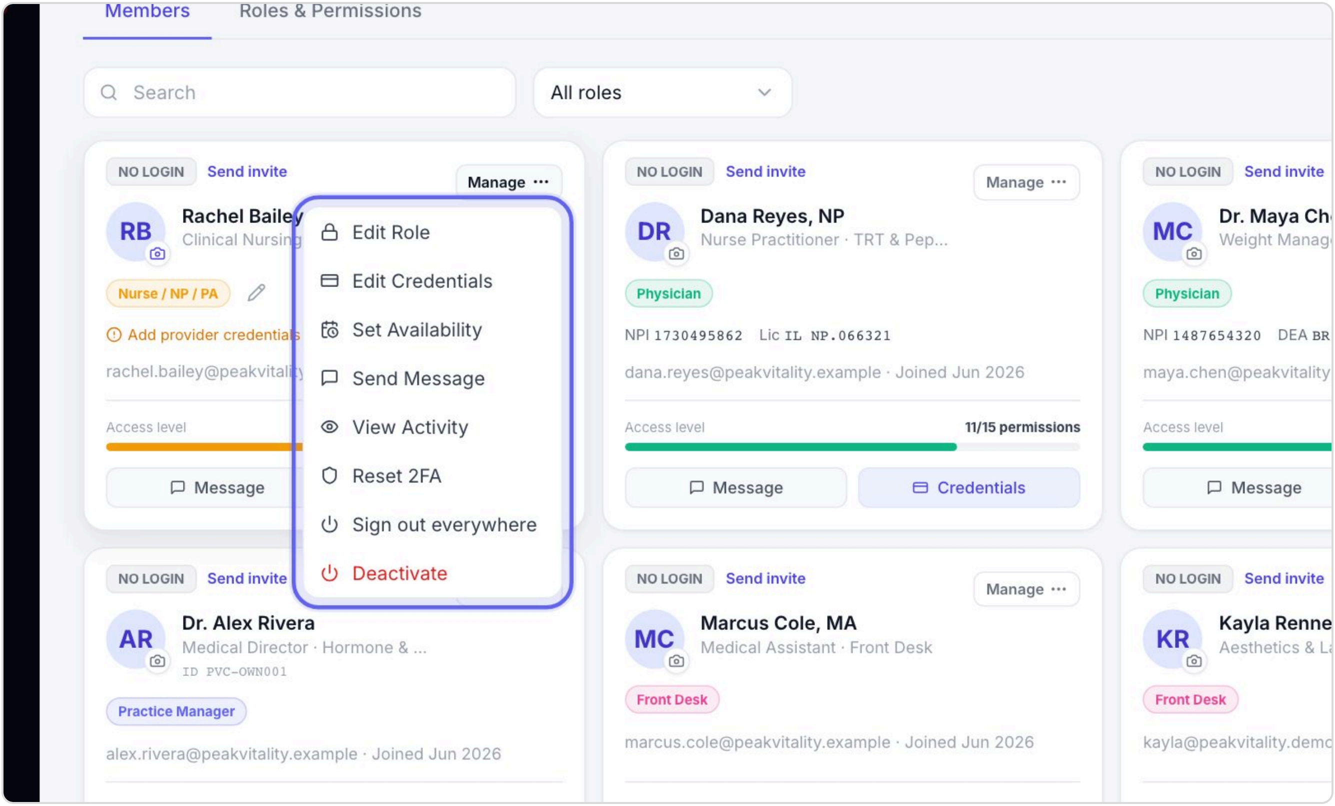
6. PENDING INVITATIONS

1. Invites nobody has accepted yet are listed under **Pending Invitations**, with when each was sent.
2. An invite lasts 7 days. **Refresh** sends the email again and gives them 7 more days.
3. **Cancel** takes the invite back.

7. THE MANAGE MENU

1. Click **Manage** in the corner of a card.
2. You see **Edit Role**, **Edit Credentials**, **Set Availability**, **Send Message**, **View Activity**, **Reset 2FA**, **Sign out everywhere** and **Deactivate**.

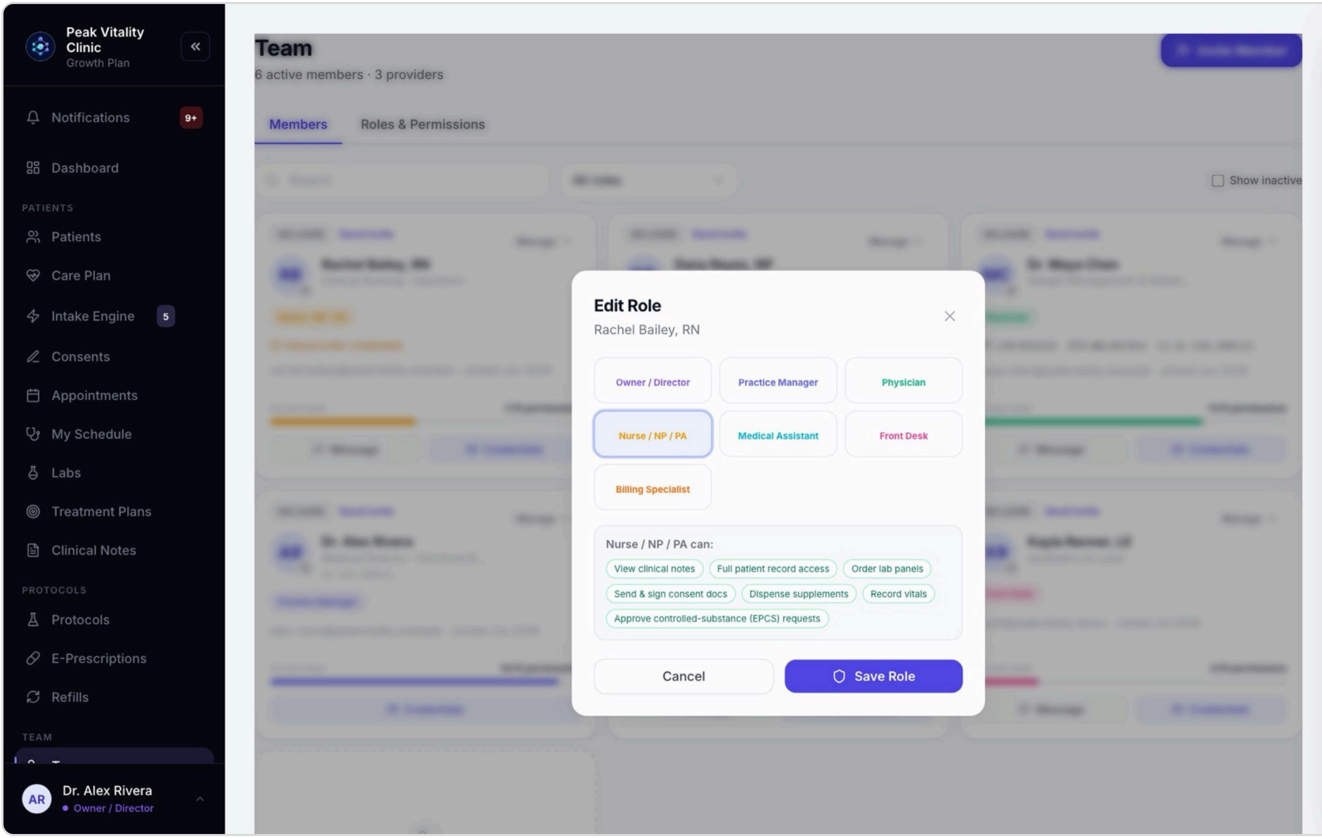
3. You only see the items your role is allowed to use.



Manage holds everything you can do for one person.

8. CHANGE SOMEONE'S ROLE

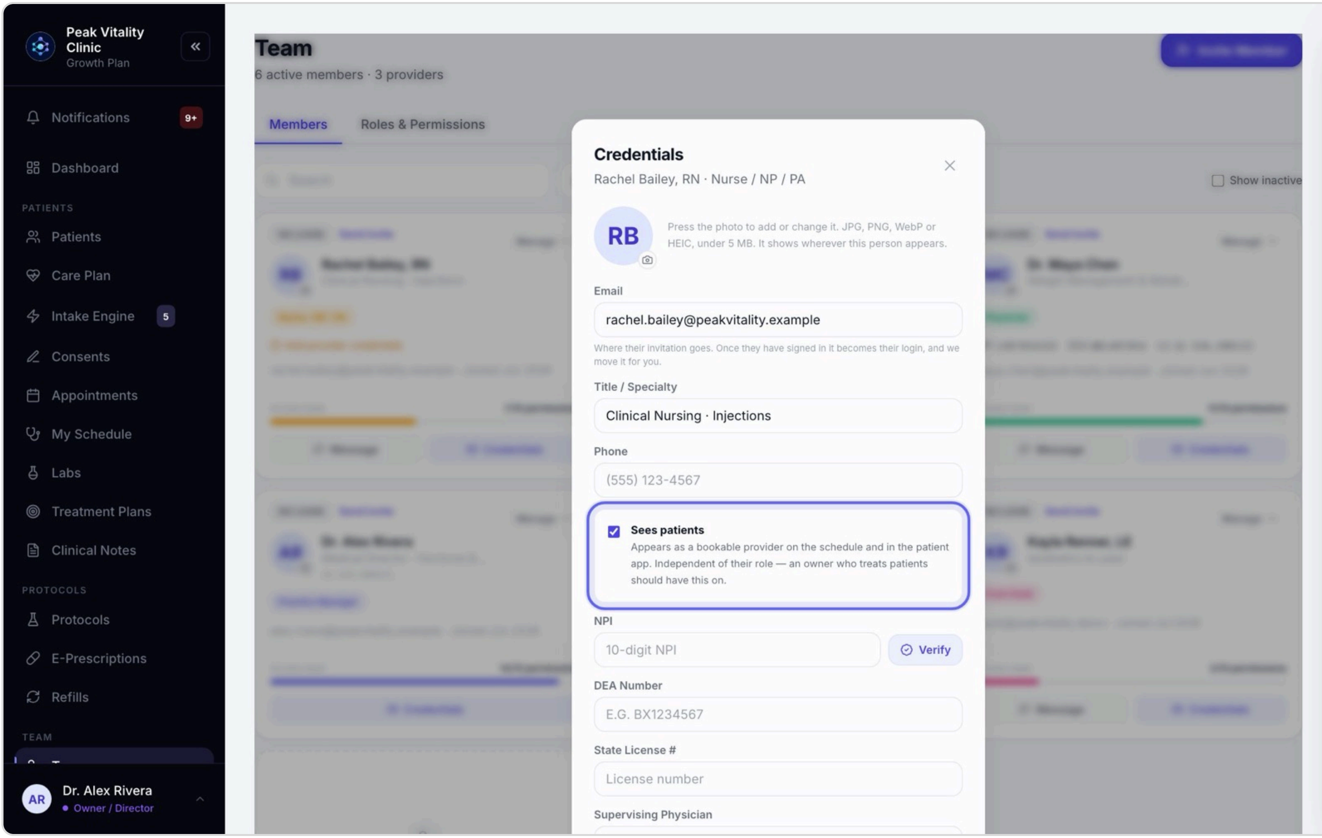
1. Choose **Edit Role** in the Manage menu. You can also hover over the role tag and click the pencil.
2. Pick the new role. The box below lists what that role can do in your clinic.
3. Press **Save Role**.



Edit Role: pick a role and see what it can do before you save.

9. CREDENTIALS

1. Click **Credentials** on the card, or **Edit Credentials** in the Manage menu. You can always edit your own.
2. Fill in **Title / Specialty** and **Phone**.
3. Tick **Sees patients** for anyone patients can book with. An owner who treats patients should tick it too. Only an owner or manager can change it.
4. For someone who sees patients, add their **NPI** and press **Verify** to check it against the national registry. Add their **DEA Number**, **State License #**, **Supervising Physician** and **License Expiry**.
5. Under **Licensed States**, type a two-letter code like TX and press Enter. Prescribing is blocked for patients in states not on the list.
6. Press **Save**.



Credentials: contact details, Sees patients, and the provider's numbers.

10. FIX AN EMAIL ADDRESS

1. Open **Credentials** and change **Email**, then press **Save**.
2. If they have a pending invite, it is sent again to the new address.
3. Once someone has signed in, their email is their login and can't be changed here. Contact Aminova and we will move it.

11. SET AVAILABILITY

1. Owners and managers see **Set Availability** for anyone who sees patients.
2. Pick their **Usual working days**, when the day starts and ends, and **Max Appointments / Day (capacity)**.
3. Click **Add a break** to block out lunch or admin time every working day.
4. Press **Save Availability**.

Tip. On any day someone has a shift in Staff Scheduling, the shift decides when they can be booked. Breaks and the daily cap from here still apply.

12. MESSAGE AND ACTIVITY

1. **Message** or **Send Message** opens a private chat with that person.
2. **View Activity** shows what they have done in Aminova in the last 90 days, from your clinic's audit log.

13. WHEN SOMEONE LEAVES

1. Choose **Deactivate** in the Manage menu, then **Deactivate** again to confirm. They keep their record but can't sign in.
2. To bring them back, tick **Show inactive**, open **Manage** and choose **Reactivate**. They get a new team member ID. Share it with them so they can sign in.
3. **Sign out everywhere** ends their sign-in on every device, like after a lost phone.
4. **Reset 2FA** makes them set up two-step sign-in again the next time they sign in.

14. NOT ON THE STAFF LIST

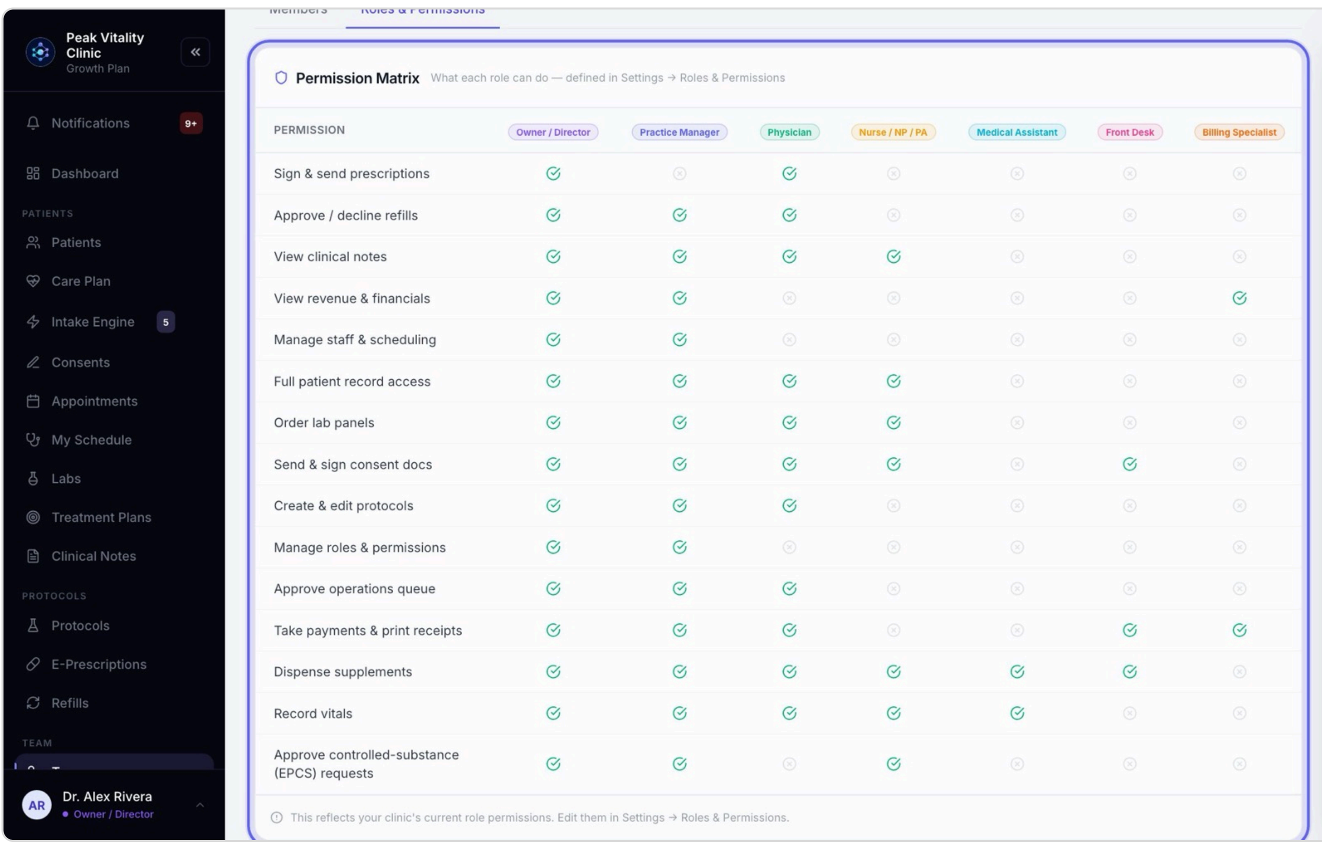
This box only shows when someone can sign in but isn't on your staff list. Visits can't be put on them, and their My Schedule stays empty.

Click **Add to staff list** to fix it.

15. ROLES & PERMISSIONS

The **Roles & Permissions** tab is a table. Each row is something a person can do, each column is a role, and a check means that role can do it.

This tab only shows the rules. To change them, go to **Settings** and open **Roles & Permissions**.



PERMISSION	Owner / Director	Practice Manager	Physician	Nurse / NP / PA	Medical Assistant	Front Desk	Billing Specialist
Sign & send prescriptions	✓	✗	✓	✗	✗	✗	✗
Approve / decline refills	✓	✓	✓	✗	✗	✗	✗
View clinical notes	✓	✓	✓	✓	✗	✗	✗
View revenue & financials	✓	✓	✗	✗	✗	✗	✓
Manage staff & scheduling	✓	✓	✗	✗	✗	✗	✗
Full patient record access	✓	✓	✓	✓	✗	✗	✗
Order lab panels	✓	✓	✓	✓	✗	✗	✗
Send & sign consent docs	✓	✓	✓	✓	✗	✓	✗
Create & edit protocols	✓	✓	✓	✗	✗	✗	✗
Manage roles & permissions	✓	✓	✗	✗	✗	✗	✗
Approve operations queue	✓	✓	✓	✗	✗	✗	✗
Take payments & print receipts	✓	✓	✓	✗	✗	✓	✓
Dispense supplements	✓	✓	✓	✓	✓	✓	✗
Record vitals	✓	✓	✓	✓	✓	✗	✗
Approve controlled-substance (EPCS) requests	✓	✓	✗	✓	✗	✗	✗

This reflects your clinic's current role permissions. Edit them in Settings → Roles & Permissions.

The permission table: a check means that role can do it.