

# Workflows

Messages and tasks that happen on their own. Pick what starts one, who it is for and what it does, check who it reaches, then switch it on.

Page manual · For Owners, Managers, Providers · [aminova.health/university/workflows](https://aminova.health/university/workflows)

## 1. THE PAGE AT A GLANCE

A workflow is a set of steps that runs on its own when something happens, like a visit ending or a lab result coming in. It can message the patient, send a form, or give your team a task.

At the top are your **Sending rules**. Below them are three tabs: **Workflows**, **Templates** and **History**. Owners, managers and providers can build and switch workflows. Others can look.

**Peak Vitality Clinic**  
Growth Plan

**Workflows**  
Automations for patients and your team.  
5 workflows on · 431 runs in the last 30 days

**Sending rules** Quiet 8:00 pm to 8:00 am Max 2 messages per patient a day Patients' opt-outs always apply [Change](#)

**Workflows** Templates History

- Missed check-in outreach** On  
Missed check-in  
242 runs in 30 days
- Appointment reminder** On  
Appointment coming up  
178 runs in 30 days
- Birthday greeting** On  
Patient birthday  
11 runs in 30 days
- Refill due reminder** On  
Refill request waiting  
No runs in 30 days
- New lab flagged → provider task** On  
Abnormal lab result  
No runs in 30 days
- Failed payment recovery** Off  
Payment failed  
No runs in 30 days

**Missed check-in outreach** On  
Nudges a patient in their app, then hands it to the care team if they still have not checked in

Switch off Edit Duplicate Check now Delete

When a patient misses a check-in on their schedule (their cadence plus 3 days): send a notification in the patient's app, then wait 2 days, then create a task for the care team, due in 1 day unless the patient checked in.

**Runs** 420 **Last 30 days** 242 **Done in full** 100% **Last ran** Sep 23, 1:01 PM

**WHO IT REACHES**

**34 patients: everyone on the patient list**  
Everyone who is not inactive or archived.  
34 can get automated messages.

Anthony Nguyen, Brian Flores, Curtis Anderson, Curtis Taylor, Delia Rodriguez, Dominic Jackson, Elliot Martinez, Emily Young, Hugo Perez, James Smith, Joshua Sanchez, Mark Jones, Matthew Walker, Melissa Clark, Nadia King, Nancy Torres, Odette Johnson, Otis Walker, Rebecca King, Reuben Wilson, Rhett Flores, Roman Sanchez, Rosalind Hernandez, Rowan Davis, Sabine Ramirez, and 9 more

**STEPS**

Workflows, with the sending rules across the top.

## 2. SENDING RULES

1. The row shows your quiet hours and the most automatic messages one patient can get in a day.
2. Click **Change**. Tick **Hold patient messages overnight** and set the times. Messages to patients wait until morning. Team alerts are never held.
3. Set the **Daily limit** per patient. 0 means no limit.

#### 4. Press **Save**.

The screenshot shows the 'Workflows' section of the Peak Vitality Clinic interface. On the left is a dark sidebar with navigation links: Peak Vitality Clinic, Growth Plan, Notifications (9+), Dashboard, INTS, Patients, Care Plan, Intake Engine (5), Consents, Appointments, My Schedule, and Labs. The main content area is titled 'Workflows' and includes a subtitle 'Automations for patients and your team.' and a status '5 workflows on · 431 runs in the last 30 days'. A 'New workflow' button is in the top right. Below the title is a 'Sending rules' section with three active rules: 'Quiet 8:00 pm to 8:00 am', 'Max 2 messages per patient a day', and 'Patients' opt-outs always apply'. A 'Change' link is on the right. Below this are tabs for 'Workflows', 'Templates', and 'History'. The 'Workflows' tab is active, showing a list of three workflows: 'Missed check-in outreach' (242 runs in 30 days), 'Appointment reminder' (178 runs in 30 days), and 'Birthday greeting' (11 runs in 30 days). Each workflow has a toggle switch on the right, all of which are turned on. The 'Missed check-in outreach' workflow is expanded, showing its description: 'Nudges a patient in their app, then hands it to the care team if they still have not checked in'. Below the description are buttons for 'Switch off', 'Edit', 'Duplicate', 'Check now', and 'Delete'. A detailed description of the workflow is shown in a light blue box: 'When a patient misses a check-in on their schedule (their cadence plus 3 days): send a notification in the patient's app, then wait 2 days, then create a task for the care team, due in 1 day unless the patient checked in.'

Sending rules: quiet hours and a daily limit, for every automatic message.

**Tip. Patients' opt-outs always apply.** Nothing automatic reaches a patient by a channel they turned off.

### 3. YOUR WORKFLOWS

1. Each row shows the workflow's name, what starts it, and how many times it ran in the last 30 days.
2. The switch on the right turns it on or off.
3. Click a row to open it on the right.

The screenshot shows the 'Workflows' section of the Aminova Health interface. On the left, a sidebar lists various system components. The main content area is divided into two parts: a list of workflows on the left and a detailed view of the 'Missed check-in outreach' workflow on the right.

**Workflow List:**

- Missed check-in outreach** (Toggle: On)
  - Missed check-in
  - 242 runs in 30 days
- Appointment reminder** (Toggle: On)
  - Appointment coming up
  - 178 runs in 30 days
- Birthday greeting** (Toggle: On)
  - Patient birthday
  - 11 runs in 30 days
- Refill due reminder** (Toggle: On)
  - Refill request waiting
  - No runs in 30 days
- New lab flagged → provider task** (Toggle: On)
  - Abnormal lab result
  - No runs in 30 days
- Failed payment recovery** (Toggle: Off)
  - Payment failed
  - No runs in 30 days

**Missed check-in outreach (On) - Detailed View:**

Nudges a patient in their app, then hands it to the care team.

Buttons: Switch off, Edit, Duplicate, Play

When a patient misses a check-in on their schedule (through the patient's app), then wait 2 days, then create a task for the patient to be checked in.

Runs: 420 (Last 30 days: 242)

**WHO IT REACHES**

34 patients: everyone on the patient list  
Everyone who is not inactive or archived.  
34 can get automated messages.

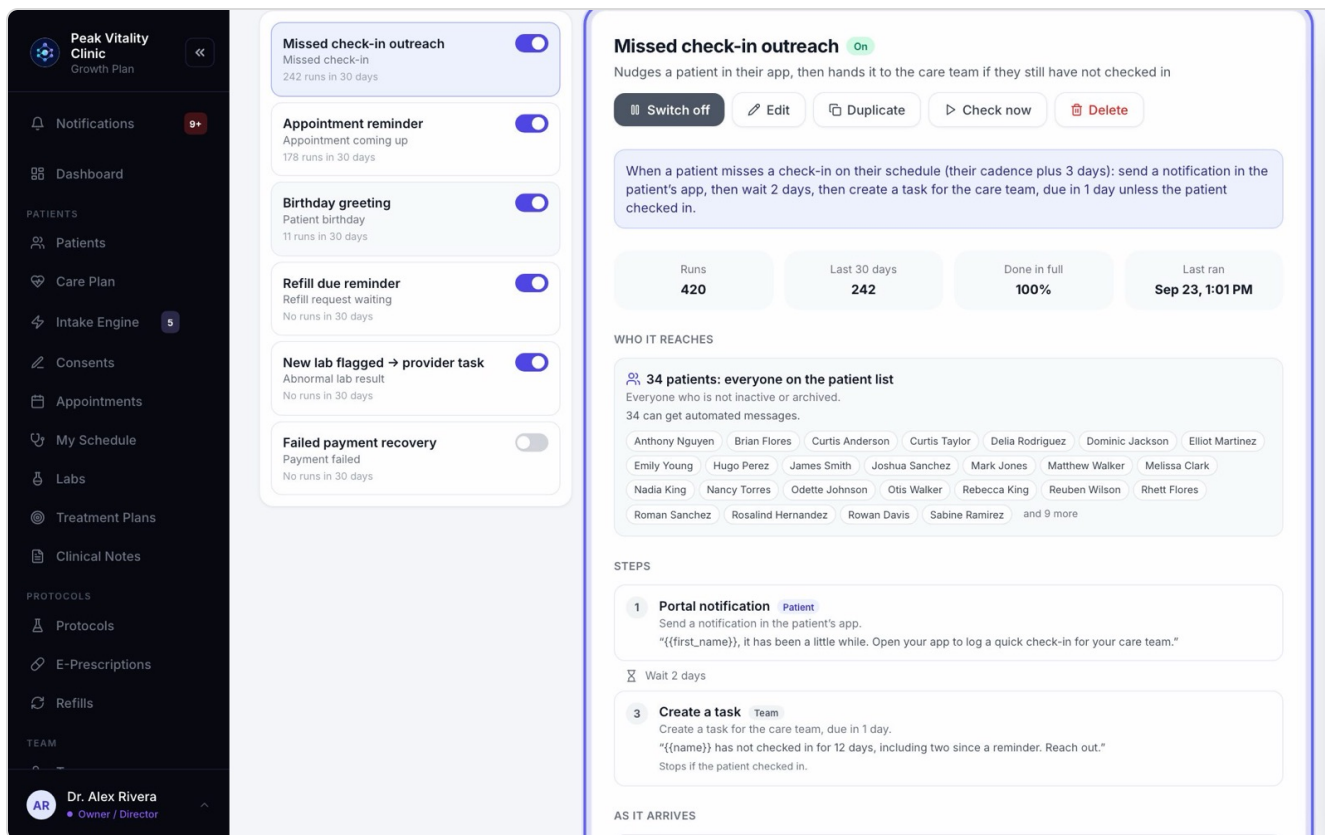
Patients listed: Anthony Nguyen, Brian Flores, Curtis Anderson, Curtis Taylor, Emily Young, Hugo Perez, James Smith, Joshua Sanchez, Nadia King, Nancy Torres, Odette Johnson, Otis Walker, Roman Sanchez, Rosalind Hernandez, Rowan Davis, Sabine Davis.

**STEPS**

Your workflows, each with its own on and off switch.

#### 4. INSIDE A WORKFLOW

1. The blue box says in one sentence what it does.
2. **Runs**, **Last 30 days**, **Done in full** and **Last ran** show how it's going.
3. **Who it reaches** counts the patients it matches now. **Steps** lists what happens, in order, and marks each one **Patient** or **Team**.
4. **As it arrives** shows each message the way it will look.
5. **Run history** lists every time it ran. Click a patient's name to see only theirs.



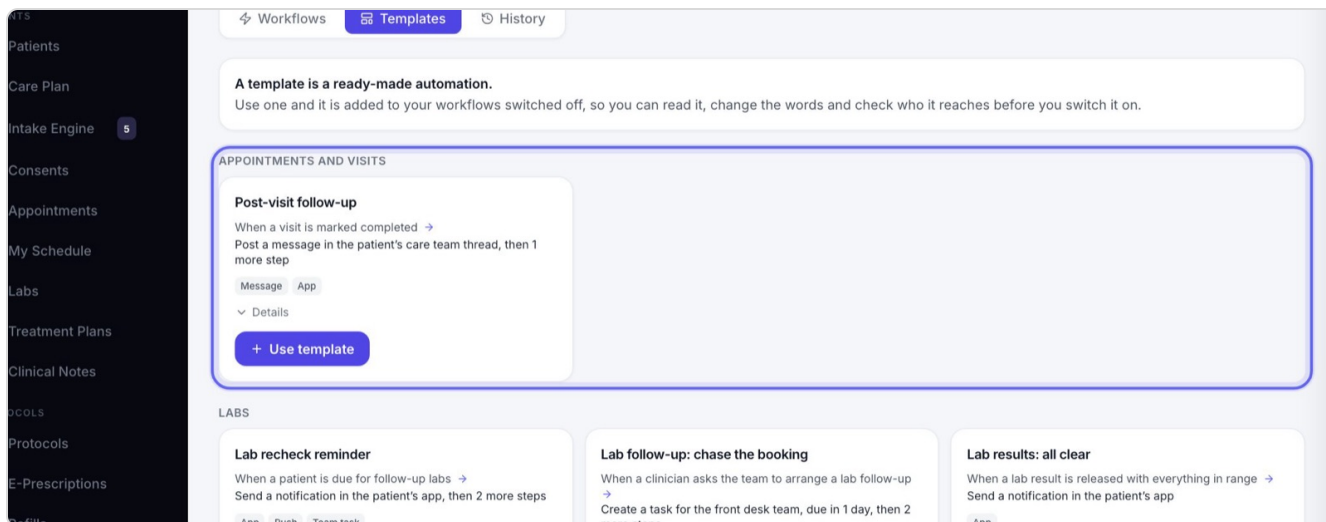
One workflow, opened: who it reaches and its steps, in order.

## 5. CHANGE A WORKFLOW

1. **Switch on** or **Switch off**. Switching off pauses anyone partway through. Switch it back on and they carry on from the same step.
2. **Edit** opens it in the builder. **Duplicate** makes a copy that starts switched off.
3. **Check now** runs an hourly workflow right away. It first says how many patients it will act on.
4. **Delete** removes it and takes everyone out of it. Its run history is kept.

## 6. START FROM A TEMPLATE

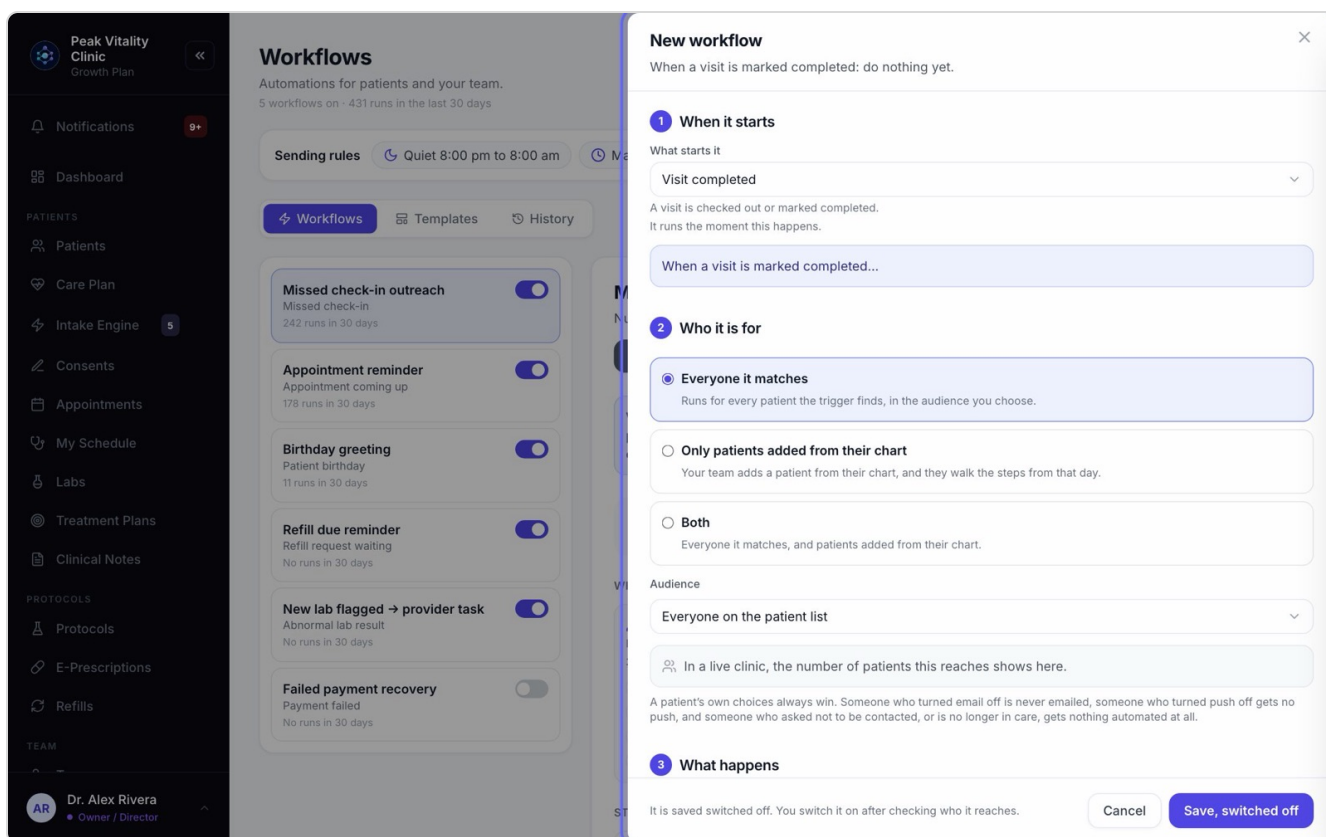
1. Open the **Templates** tab. Templates are ready-made workflows, grouped by purpose.
2. Each card says what starts it and what it does. **Details** says more.
3. Press **Use template**. It is added to your workflows switched off, so you can read it and change the words first.



Templates: ready-made workflows you can add and change.

## 7. BUILD YOUR OWN

1. Click **New workflow**. The builder opens on the right in four parts.
2. Under **When it starts**, open **What starts it** and pick an event. You can search the list.
3. Some starts run the moment it happens. Others are checked every hour. The builder says which.
4. Some starts ask for more, like which lab marker or which form.



The workflow builder: when it starts, then who it is for.

## 8. WHO IT IS FOR

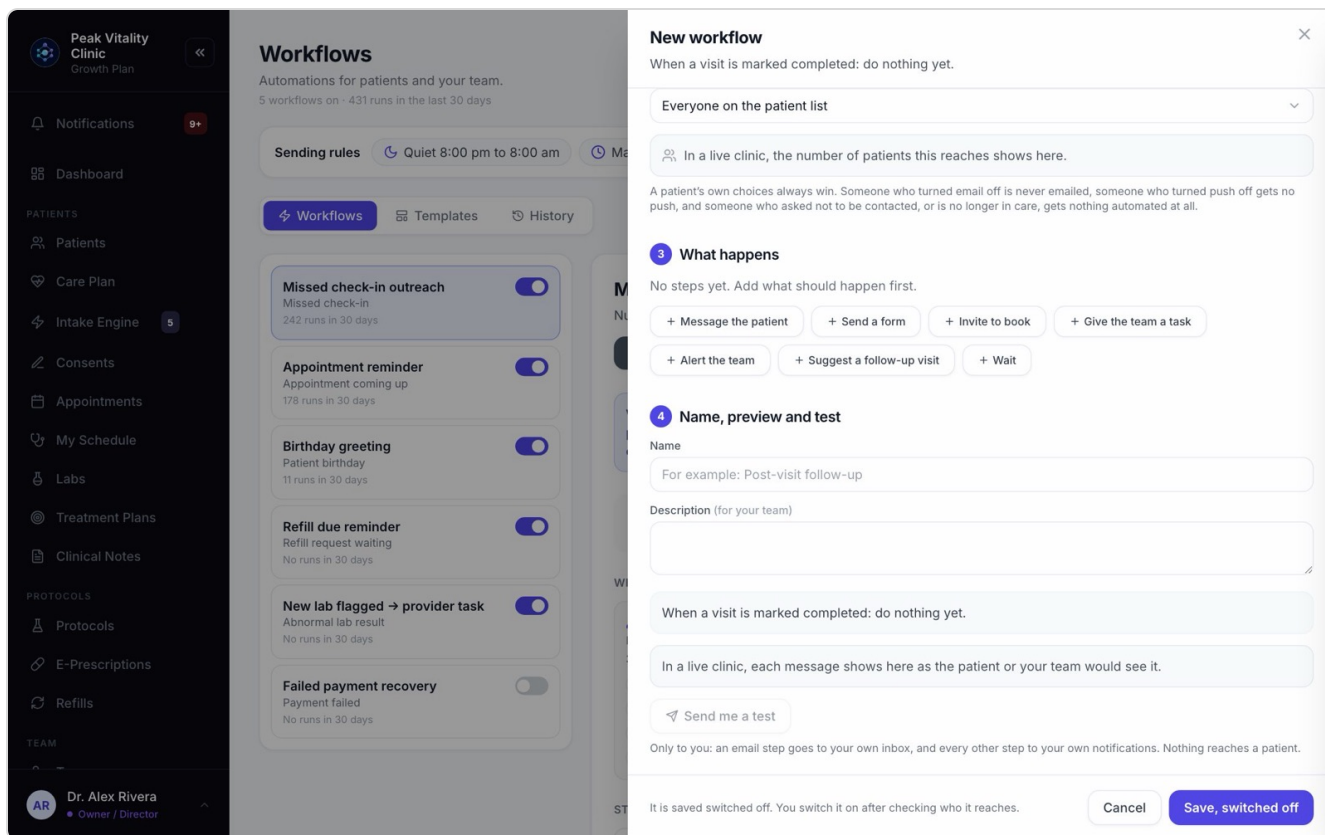
1. **Everyone it matches** runs for every patient the start finds, in the **Audience** you pick.
2. **Only patients added from their chart** runs only for patients your team adds by hand.
3. **Both** does both.
4. Pick the **Audience**: everyone, active patients, new patients, patients with a visit soon, patients who owe money, members, or one protocol. The count below shows who that is right now.

The screenshot shows the Peak Vitality Clinic Workflows interface. On the left is a sidebar with navigation links: Notifications (9+), Dashboard, PATIENTS (Patients, Care Plan, Intake Engine (5), Consents, Appointments, My Schedule, Labs, Treatment Plans, Clinical Notes), PROTOCOLS (Protocols, E-Prescriptions, Refills), and TEAM (Dr. Alex Rivera, Owner / Director). The main area is titled 'Workflows' and shows a list of existing workflows: 'Missed check-in outreach' (242 runs in 30 days), 'Appointment reminder' (178 runs in 30 days), 'Birthday greeting' (11 runs in 30 days), 'Refill due reminder' (No runs in 30 days), 'New lab flagged → provider task' (No runs in 30 days), and 'Failed payment recovery' (No runs in 30 days). A 'New workflow' modal is open on the right. It has a title bar 'New workflow' and a close button. The first step is 'When a visit is marked completed: do nothing yet.' The second step is 'Who it is for', with three radio button options: 'Everyone it matches' (selected), 'Only patients added from their chart', and 'Both'. Below these is an 'Audience' dropdown menu set to 'Everyone on the patient list' and a count: 'In a live clinic, the number of patients this reaches shows here.' The third step is 'What happens', with the text 'No steps yet. Add what should happen first.' and several buttons: '+ Message the patient', '+ Send a form', '+ Invite to book', '+ Give the team a task', '+ Alert the team', '+ Suggest a follow-up visit', and '+ Wait'. The fourth step is 'Name, preview and test', with a 'Name' input field containing 'For example: Post-visit follow-up'. At the bottom of the modal are 'Cancel' and 'Save, switched off' buttons. A note at the bottom of the modal says 'It is saved switched off. You switch it on after checking who it reaches.'

Who it is for: everyone it matches, or only patients you add.

## 9. WHAT HAPPENS

1. Add steps with the buttons: **Message the patient**, **Send a form**, **Invite to book**, **Give the team a task**, **Alert the team**, **Suggest a follow-up visit** or **Wait**.
2. Write the words for each message, or leave the box empty to use the standard words shown.
3. Put a **Wait** between steps to space them out.
4. Under **Stop here if**, tick what should end it, like the patient booking a visit or replying.



What happens: add steps, and waits between them.

## 10. NAME IT, TEST IT, SAVE IT

1. Give it a **Name**, and a **Description** for your team if you like.
2. The preview shows each message, written for a sample patient.
3. Press **Send me a test**. It goes only to you: email steps to your inbox, the rest to your notifications. Nothing reaches a patient.
4. Press **Save, switched off**.

## 11. SWITCH IT ON

1. Press **Switch on**, or flip its switch in the list.
2. A box says **Who it will reach**, **When it acts**, and **What protects patients**.
3. Check it, then press **Switch it on**.

**Tip.** Nothing is sent while a workflow is off. A new workflow, and every template you add, starts off.

## 12. ADD A PATIENT FROM THEIR CHART

1. For a workflow set to **Only patients added from their chart** or **Both**, open the patient's chart.
2. On the **Overview**, click **Automations**.

3. Under **Add to a workflow**, choose it, pick a **Start** date if you like, and press **Add**. They start its steps from that day.
4. The workflow's own page lists them under **Patients added from their charts**, with **Pause**, **Resume** and **Stop**.

## 13. RUN HISTORY

1. Open the **History** tab. Every run is here, newest first.
2. Pick one workflow, or leave it on **Every workflow and reminder**.
3. Filter by **Sent**, **Partly sent**, **Failed** or **Skipped**, or pick dates.
4. Click a run to see what each step did, and why anything didn't go.

The screenshot displays the 'Run History' page for 'Peak Vitality Clinic'. The interface includes a sidebar with navigation options like Notifications, Dashboard, Patients, and Care Plan. The main content area shows a list of workflow runs. At the top, there's a filter dropdown set to 'Every workflow and reminder' and a date range selector. Below this are tabs for 'All', 'Sent', 'Partly sent', 'Failed', and 'Skipped'. The list of runs includes:

- Birthday greeting** (Elizabeth Johnson) - Skipped (16 h ago)
- Birthday greeting** (Elizabeth Johnson) - Skipped (yesterday)
- Refill reminder** (Giselle Moore) - Sent (yesterday)
- Missed check-in outreach** (Desmond Williams) - Sent (yesterday)
- Missed check-in outreach** (Jason Wilson) - Sent (yesterday)
- Birthday greeting** (Daniel White) - Skipped (yesterday)
- Birthday greeting** (Daniel White) - Skipped (2 days ago)
- Refill reminder** (Xavier Sanchez) - Sent (2 days ago)
- Refill reminder** (Emmett White) - Sent (2 days ago)
- Appointment reminder** (Steven Lopez) - Failed (3 days ago)
- Appointment reminder** (Tamsin Martin) - Failed (3 days ago)
- Appointment reminder** (Curtis Taylor) - Failed (3 days ago)
- Appointment reminder** (Emmett White) - Failed (3 days ago)
- Appointment reminder** (Tobias Nguyen) - Failed (3 days ago)

History: every run, and what each step did.

**Tip.** Your practice patient never gets emails or texts from a workflow.