Workflows

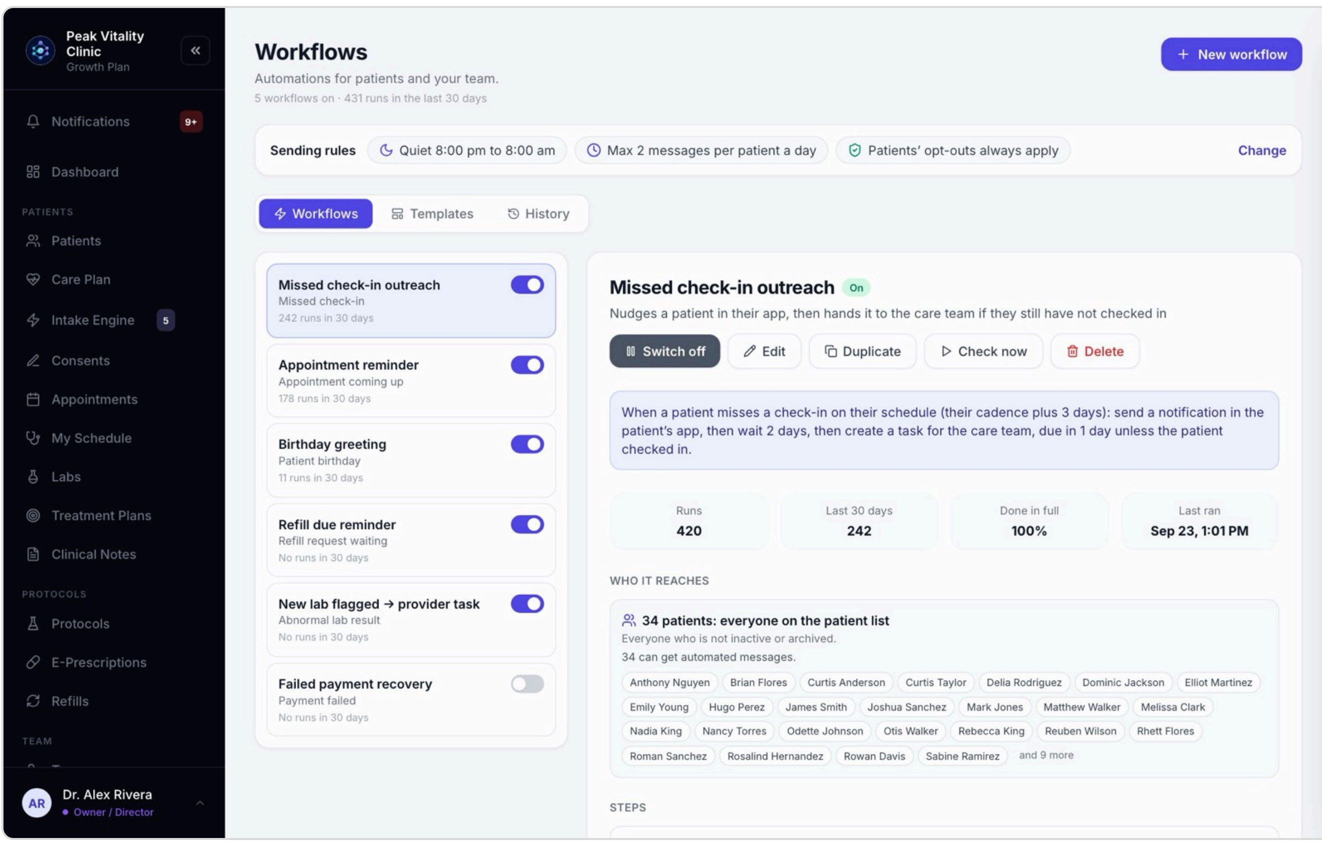
Messages and tasks that happen on their own. Pick what starts one, who it is for and what it does, check who it reaches, then switch it on.

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

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.

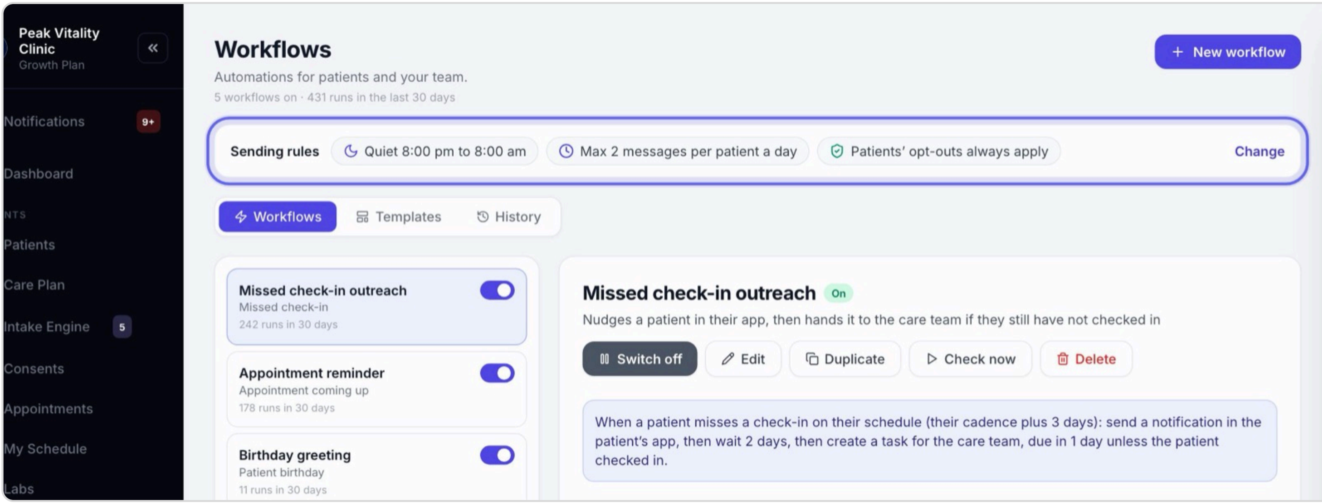


Workflows, with the sending rules across the top.

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**.

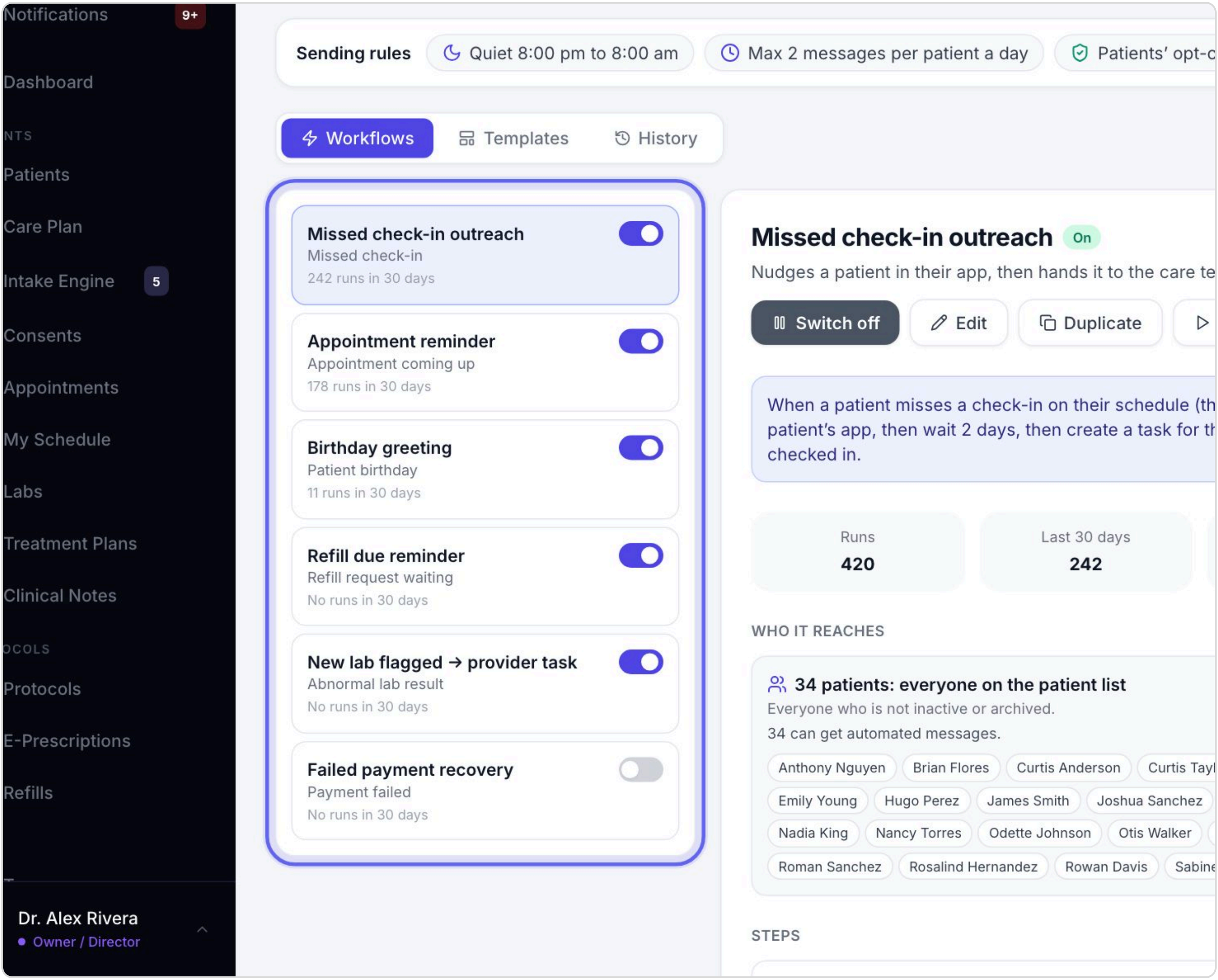


Sending rules: quiet hours and a daily limit, for every automatic message.

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

3. YOUR WORKFLOWS

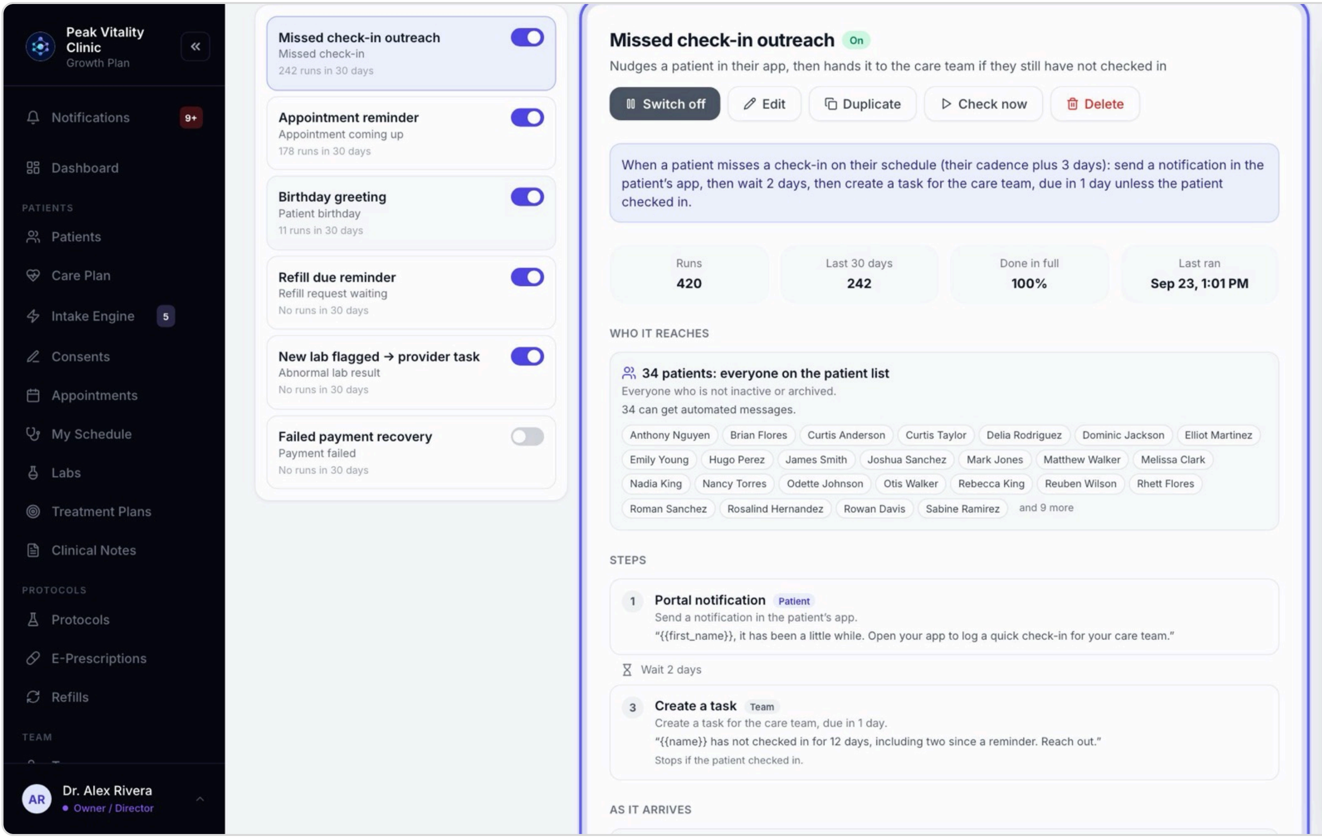
1. Each row shows the workflow's name, what starts it, and how many times it ran in the last 30 days.
2. The switch on the right turns it on or off.
3. Click a row to open it on the right.



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.



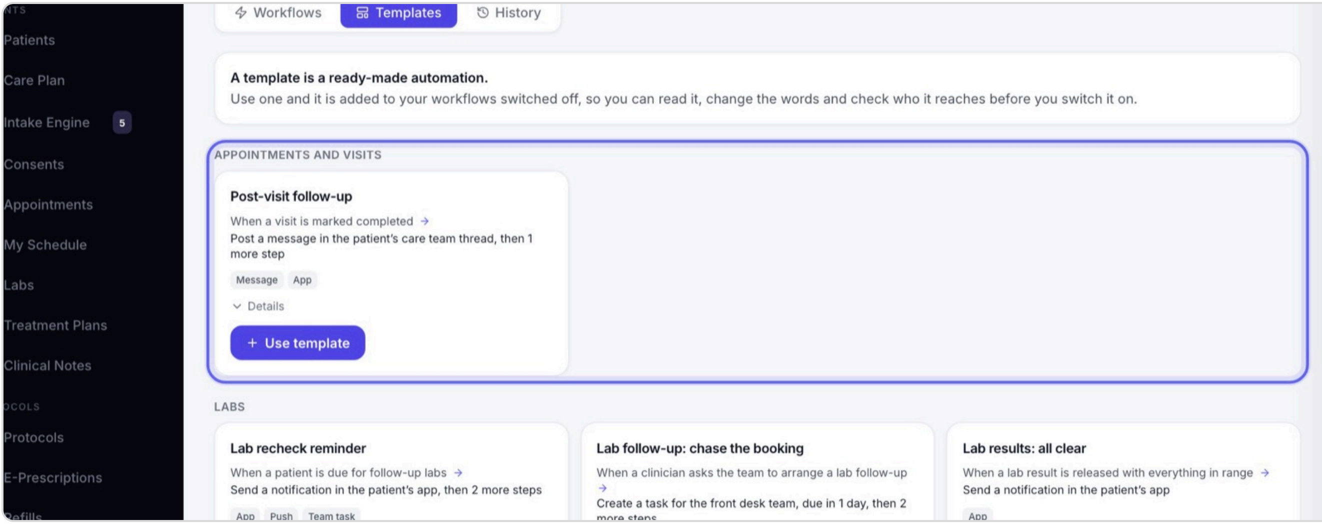
One workflow, opened: who it reaches and its steps, in order.

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

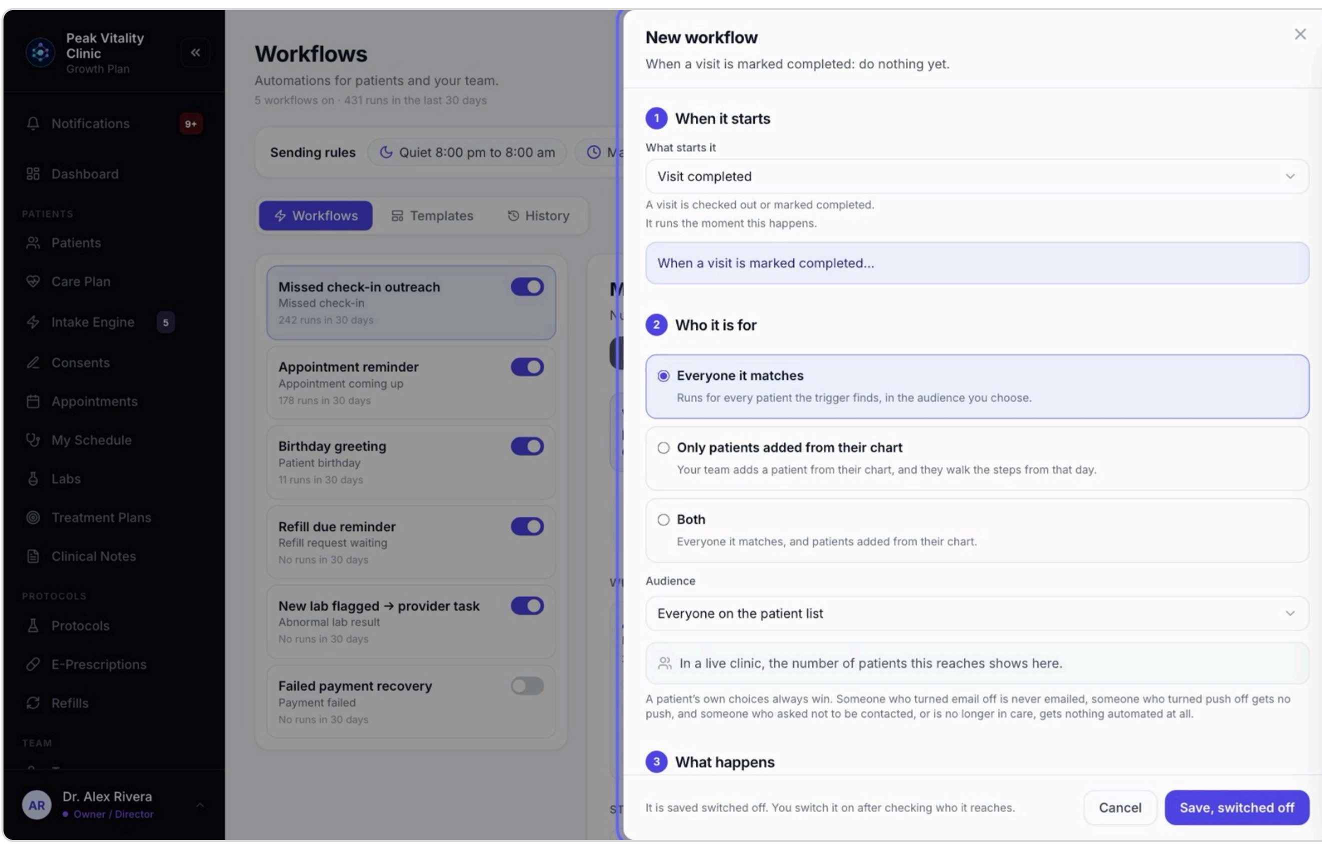
1. Open the **Templates** tab. Templates are ready-made workflows, grouped by purpose.
2. Each card says what starts it and what it does. **Details** says more.
3. Press **Use template**. It is added to your workflows switched off, so you can read it and change the words first.



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

7. BUILD YOUR OWN

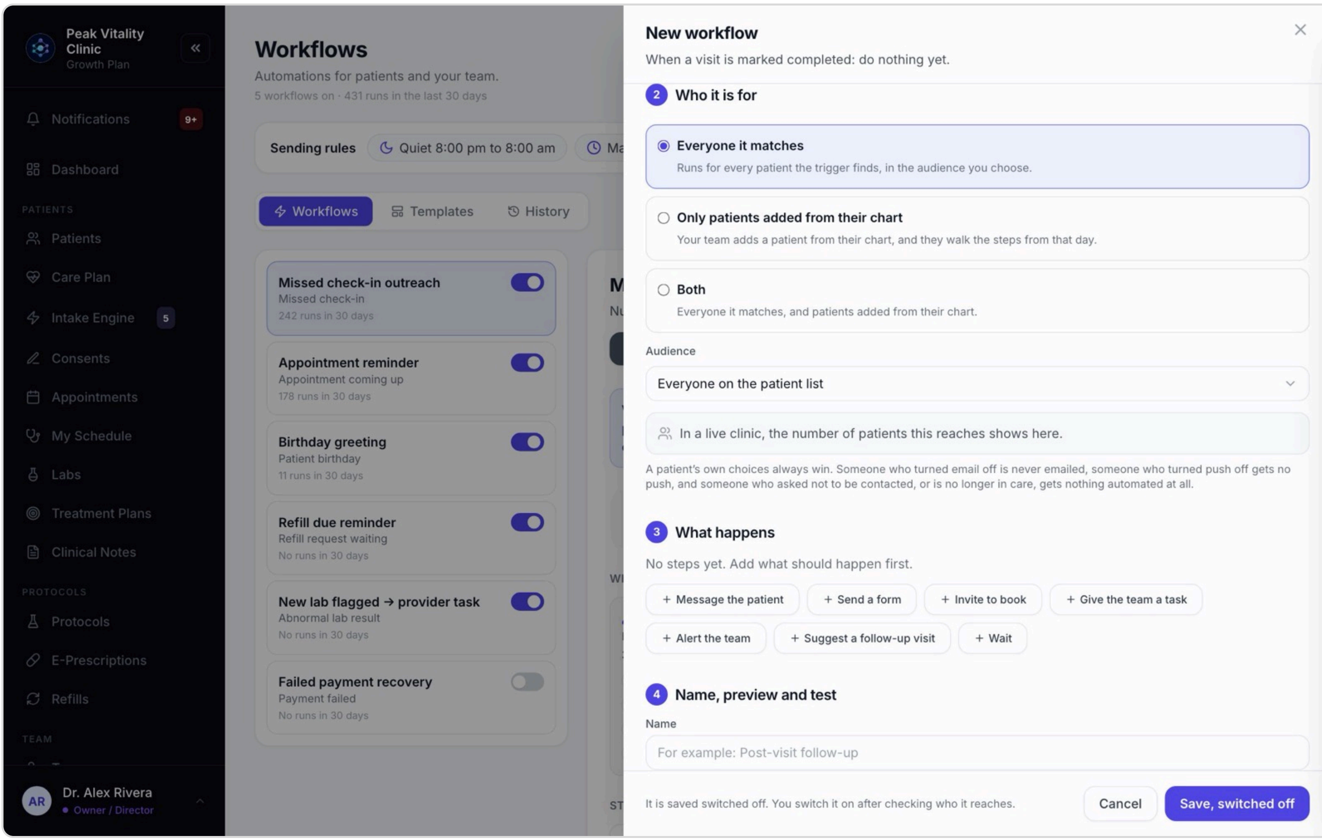
1. Click **New workflow**. The builder opens on the right in four parts.
2. Under **When it starts**, open **What starts it** and pick an event. You can search the list.
3. Some starts run the moment it happens. Others are checked every hour. The builder says which.
4. Some starts ask for more, like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



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

8. WHO IT IS FOR

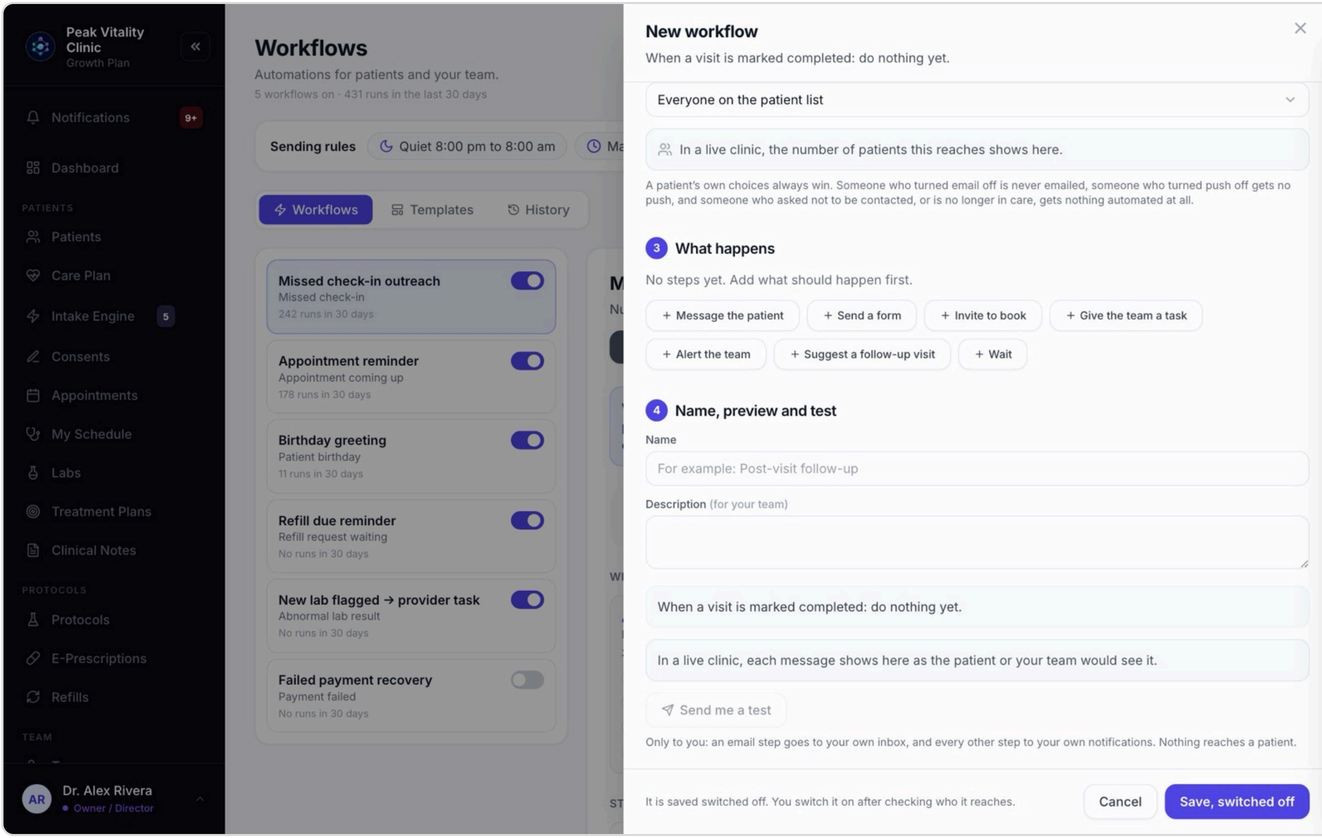
1. **Everyone it matches** runs for every patient the start finds, in the **Audience** you pick.
2. **Only patients added from their chart** runs only for patients your team adds by hand.
3. **Both** does both.
4. Pick the **Audience**: everyone, active patients, new patients, patients with a visit soon,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



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.

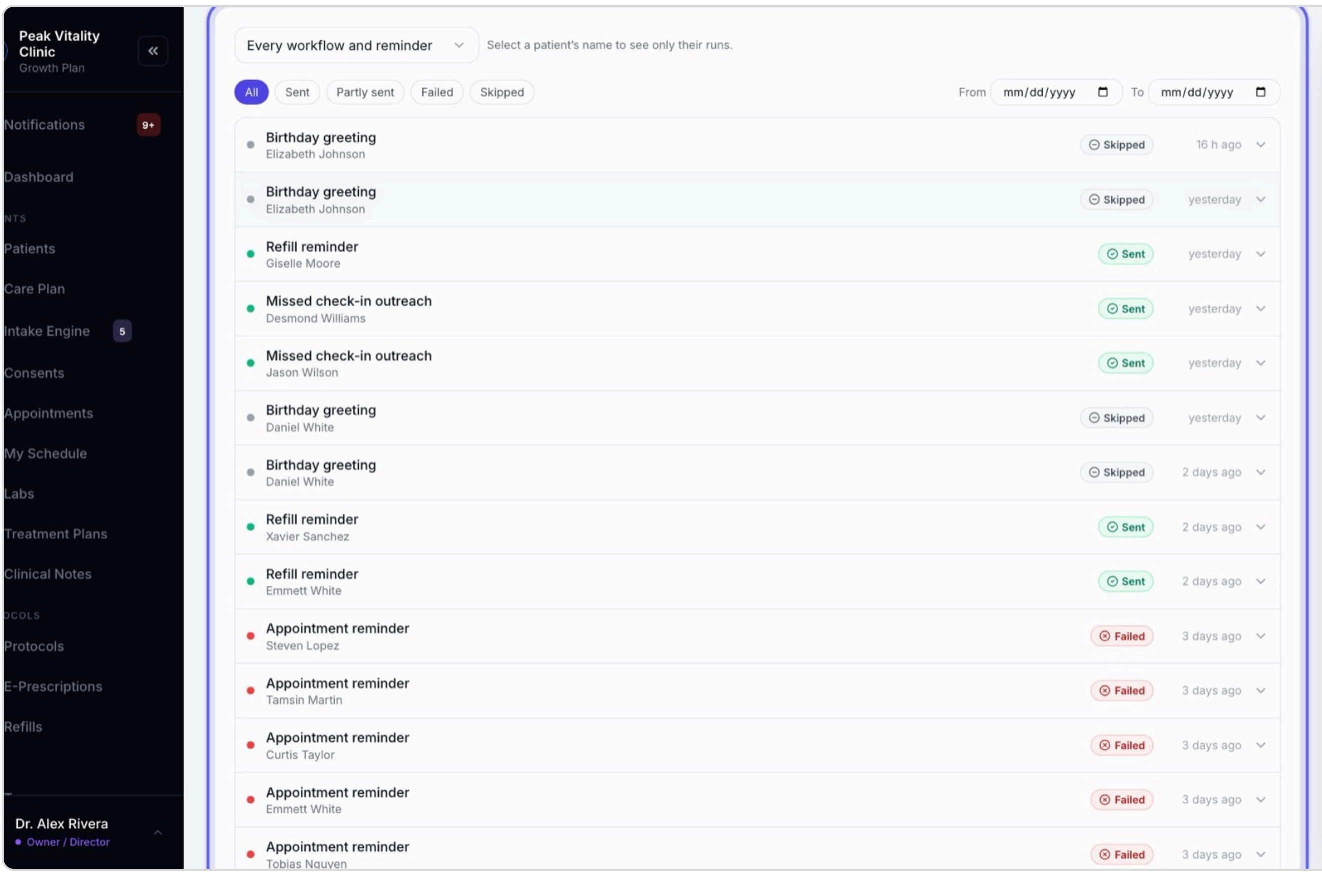
12. ADD A PATIENT FROM THEIR CHART

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.



History: every run, and what each step did.

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