

Get help using Consultmed, any time you need it.

Consultmed Settings

How do I switch between multiple workplaces?

To navigate between your different workplaces, click on the **'Select Establishment'** dropdown at the top left-hand side of the page. From there, you can choose your specific practice, department or specialist clinic to send and review referrals.

If you have not yet registered your secondary workplace(s), select the **'Settings'** icon in the top right-hand corner. Select **'Practices & Signatures'** > **'Add secondary practice'**. Search for or enter the details of your workplace.

I am a GP. Does Consultmed integrate with my Practice Management Software (PMS)?

Yes. Consultmed has existing integrations with many of the common PMSs, including Best Practice and MedicalDirector Clinical making it easier for healthcare providers to send and receive referrals seamlessly via Consultmed.

If your practice uses **Best Practice** and would like to enable our integration via **Halo Connect**, your **Practice Manager** will need to set up a Consultmed account. Once the setup is complete, all GPs in the practice can be added, and the integration will function seamlessly at the server level.

Next Steps:

- [BP Halo Connect Installation Guide](#)
- [Watch the Video](#)
- [How to Send a Referral via Best Practice](#)

If your practice uses **MedicalDirector Clinical**, you can download the Consultmed sidebar app from the MedicalDirector Clinical widget store.

Next Steps:

- [MedicalDirector Clinical Installation Guide](#)
- [Watch the Video](#)
- [How to Send a Referral via MD Clinical Smartbar](#)

I am a Specialist. Does Consultmed integrate with my PMS?

Yes. Consultmed has existing integrations available with **MedicalDirector Clinical** and **Gentu**.

To integrate **Gentu** with Consultmed, simply link your Gentu account during the sign-up process or at any time after your Consultmed account has been set up.

Next steps:

- [Gentu Installation Guide](#)
- [Watch the Video](#)

For other PMSs, we have several integrations planned for release including Medirecords and Zedmed. Keep an eye on our newsletters for the latest updates as we roll out these enhancements!

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User Account & Password

What is my Practitioner Account?


Your **Practitioner Account** is your personal space in Consultmed, where you can send referrals and access our library of brief, user-friendly tutorials. Locate your Practitioner Account under the **'Select Establishment'** dropdown list and your name.

Any referrals sent from your Practitioner Account will only have your details listed as the referrer and won't be connected to a specific Establishment or place of work. This will allow you to send referrals if you are awaiting account verification from your place of work in Consultmed.


How do I change my password?

Go to **'Settings'** by selecting the cogwheel icon  in the top right-hand corner. Select **'Password' > 'Change Password'**. Alternatively, click **'Forgot Password?'** on the log-in page. You will receive a reset link by email. Note that this link will expire after 24 hours. If you experience any issues, you can reset your password again or visit www.consultmed.co/contact for assistance.


How do I update my personal or professional details?

Select the **'Settings'** icon  in the top right-hand corner. From there, you can access and edit various user settings, such as contact details, registration information (AHPRA number, provider numbers), places of practice, password, and email notification preferences. Within **'Practices & Signatures'**, you can add or edit your practices and the accompanying signature.

How do I create a secondary account with the same AHPRA number if I have a different email address for my different workplaces?

Select the **'Settings'** icon  in the top right-hand corner. Select **'Profile'** and **'Add secondary email'**. After submitting your secondary email, you will receive a verification code. Enter this code to link your new email with your current account. This action will create a new Consultmed account tied to the secondary email, which will be automatically connected to your existing AHPRA number.

How do I add multiple provider numbers if I work at multiple practices?

You can add up to 10 provider numbers. Select **'Settings'**  in the top right-hand corner. Select **'Registration'** and the **'Provider Number'** dropdown list. Select **'+ Add'** and enter your new provider number. Select **'Save'** and the number will be added to your saved provider number list. When creating a referral, click on **'Change'** on the referral preview page and select the relevant provider number.

How do I update my account from doctor in training to specialist?

To update your professional status on Consultmed, contact us at www.consultmed.co/contact. Our support team will update your profile and send you a confirmation once the changes have been made.

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Clinical Documents

How do I proceed with a referral if I can't find a specific hospital department or specialist clinic in the Directory of Services?

If the hospital department or specialist clinic you're seeking isn't listed in our Directory of Services, they may not yet be active on the Consultmed platform. However, you can still refer to them by starting a new referral and selecting the **'Can't find a healthcare provider'** option. Enter the provider's details manually and complete the referral process. Your referral will then be sent as a secure email.

How are my referrals stored in Consultmed?

All referrals processed through Consultmed are stored in compliance with health policy regulations. While you can archive or delete referrals, they will remain stored in the relevant sub-folders within Consultmed and can be accessed at all times.

How do I access my sent referrals after one of my previous workplaces has been removed in Consultmed? Where do these removed workplaces appear?

To view your previously connected workplaces (Establishments), click on the **'Select Establishment'** dropdown in the top left-hand corner and select **'Closed'**. A list of your removed Establishments will appear. You can select any of these to view your sent referrals. However, you will not have access to the Establishment's full referral list.

If you would like to rejoin a removed Establishment, go to **'Settings' > 'Practices & Signatures'**. Under **'Inactive'**, you will see a list of inactive Establishments. Select **'Request to join'** to re-join. An email will be sent to the Establishment's Account Holder and Super Users, who can review and action your request.

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Onboarding & Training

Our practice has multiple GPs. Can we share the same login?

Each Consultmed account is linked to a single email address per user. Doctors will therefore need their own individual email to register and to access our integration tools, which connect directly to Best Practice or Medical Director. These integrations enable patient information to be automatically imported into referrals, removing the need for manual data entry.

If you are a practice manager managing the setup, you can create an account and use the **'Admin Portal'** to invite doctors to join your establishment. This allows you to manage staff access and permissions efficiently.

First, create an account using our web portal (app.consultmed.co) by entering your email and selecting **'Create Account'**. When prompted, select the **'Practice Owner or Manager'** role and follow the instructions to set up your account for your practice.

After creating your account, you can invite providers to your practice via the **'Admin Portal'** in the **'Settings'** section. Navigate to the **'Users'** tab and select **'Invite New User'** in the top right corner of your screen. You will be notified in-app once they accept your invitation, and they will appear on your **'All Users'** list.

Do you offer training for new users?

Consultmed is designed to be easy to use. If you need guidance, your Practitioner Account features a selection of easy-to-follow tutorials. Located under **'Select Establishment'** in the dropdown menu. Your Practitioner Account is listed as your name.

For personalised online training, please submit a request through the enquiry form on our website by visiting www.consultmed.co/contact.

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Admin Portal

What is Admin Portal?

The Consultmed Admin Portal enables Account Holders and Super Users connected to a specific Establishment to manage team access (invite new staff, remove staff, and edit account permissions), update Establishment details (email, phone, address), and manage reporting and subscriptions (if applicable).

You can access the Admin Portal via **'Settings' > 'Admin Portal'**. You will only have access to Admin Portal for Establishments where you are assigned as an Account Holder or Super User.

What are Account Holders and Super Users?

An **Account Holder** is either the person who created an Establishment during account registration or someone assigned to manage that Establishment in Consultmed (often a Head of Department or Service Lead).

A **Super User** is appointed by the Account Holder to help manage the Establishment. Each Establishment can have up to two Super Users.

Both Account Holders and Super Users can access the **Admin Portal** to:

- Manage team access (invite new staff, remove staff, and edit account permissions)
- Update Establishment details (email, phone, address)
- Manage reporting and subscriptions (if applicable)

Before leaving an Establishment, Account Holders can assign another team member to take over their role. In the Admin Portal, Account Holders are identified by a **blue tag**, and Super Users by a **green tag**, under **'All Users'**.

How do I update Establishment details?

You can update your Establishment details through the **Admin Portal** and navigating to the **'Establishment'** page. From here, you can edit your organisation's name, address, phone number, website, email, service or department name, and a short description.

You can also manage key settings such as whether new users can request to join, whether the Establishment can receive referrals, and whether team members have access to the shared inbox and outbox. Once you've made your changes, select **'Update Settings'** to save them.

How do I add new staff to my Establishment?

Under the **'All Users'** tab, select **'+ Invite New User'** in the top right of your screen. You have the option to search for and invite existing Consultmed users, or select **'+ Invite'** to invite a staff member to create a new Consultmed account. Once you have entered their basic details and adjusted account permissions, the staff member will receive an invitation to join Consultmed and your Establishment via email.

Account permissions for a staff member can be edited at any time by the Account Holder or Super User. Once the staff member accepts the invitation to join your Establishment, you will be notified via email and in-app. The staff member will also appear in your **'All Users'** list.

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I have received an email from a staff member requesting to join my Establishment in Consultmed. What does this mean?

This is an important email that requires action. You are receiving it because you are listed as an Account Holder or Super User for your Establishment, and you are required to either accept or decline the request based on your knowledge of the requesting user as a member of your team.

It is important to action these requests promptly, as they affect the requesting user's ability to send referrals from your Establishment. If you accept a request, you will also have the option to update the staff member's account permissions, such as access to the shared inbox and visibility for referrers.

You will receive reminder emails until the request is actioned.

To see who in your team can manage these requests, select '**All Users**'. Account Holders and Super Users are clearly identified, and both roles have the authority to accept or decline requests.

I have received an invitation to join a new Establishment in Consultmed. What does this mean?

An Establishment is inviting you to join their service in Consultmed so you can send or receive referrals from that Establishment.

To respond, follow the prompts in the invitation email. You can either create a new account or log into Consultmed to accept or decline the invitation.

- If you accept, the new Establishment will appear in your 'Select Establishment' dropdown list (top left of the platform).
- If you decline, the Super User and Account Holders of that Establishment will be notified, and you will not be connected to their service.

How do I update a staff member's permissions?

Under '**All Users**', locate the staff member and select the three grey dots in the '**Actions**' column. A window will appear on the right side of your screen. From there, go to '**Assign Permissions**' and toggle the appropriate settings on or off. When finished, select '**Save**' to apply the changes.

What does the Pending Requests folder mean?

The '**Pending Requests**' page holds all the invitations you've sent to potential new staff members to join your *Establishment* which are yet to be responded to. Once an invitee accepts the invitation, their status will update, and they will appear in the '**All Users**' folder.

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How do I remove staff from my Establishment?

Under '**All Users**', locate the staff member you want to remove from your Establishment and select the three grey dots in the '**Actions**' column. A window will appear on the right side of your screen. From there, navigate to 'User **Management**' and select '**Remove User**'.

What happens when I remove a staff member, or they leave my Establishment?

When a staff member is removed or leaves your Establishment, they will lose access to all referrals and patient lists associated with your workplace. They will be notified via email about this change.

For administrative tracking, the individual's details will be listed in the '**Removed**' tab within the '**Admin Portal**'. If you wish to reinstate access for a staff member to your Establishment, you can select '**Restore User**' in this tab. The staff member will then receive a new invitation to the email address connected to their Consultmed account.

Patient & Carer

What does it mean if I receive a referral from a Patient/Carer?

Selected Establishments may enable a Consultmed Patient Portal, a dedicated external portal with its own standalone URL that allows patients, carers, and other health or care professionals to submit referrals directly to their service.

As a recipient, you can easily identify these referrals in your dashboard, as they will be flagged as submitted by 'Patient/Carer'.