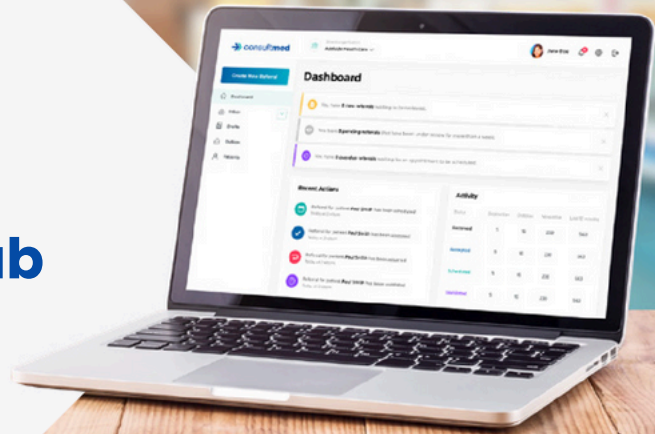
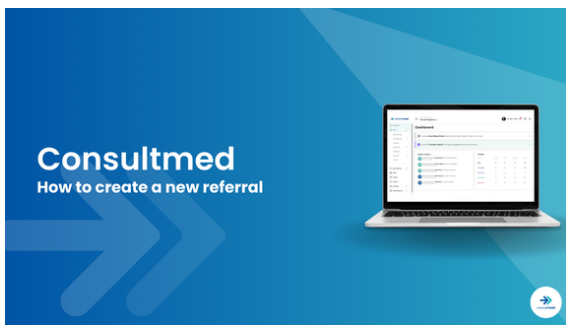


Welcome to the Consultmed Training Hub

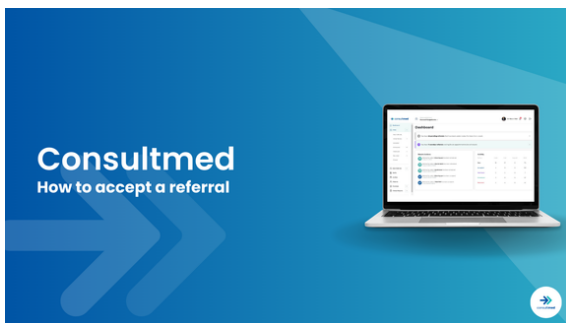


This guide provides a series of instructional videos designed to help you navigate and utilise the Consultmed referral system effectively. Each video covers a specific aspect of the referral process, from creating and scheduling referrals to managing notifications and archiving documents. Click on the image below to watch the tutorials.



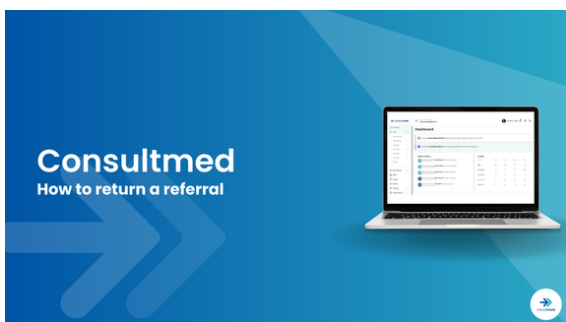
[How to create a referral](#)

- Step 1:** Create a new referral by clicking on '+ New Referral' on your dashboard
- Step 2:** Filter by categories to refine your search
- Step 3:** Choose an appropriate healthcare provider from our Directory of Services.
- Step 4:** Enter the patient's details or import from practice management software
- Step 5:** Complete the referral form and add any relevant attachments
- Step 6:** Review the referral before submitting
- Step 7:** Select referral period and tracking. Click on 'Submit' to send the referral.



[How to accept a referral](#)

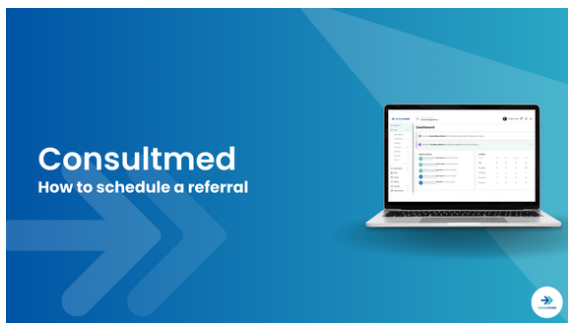
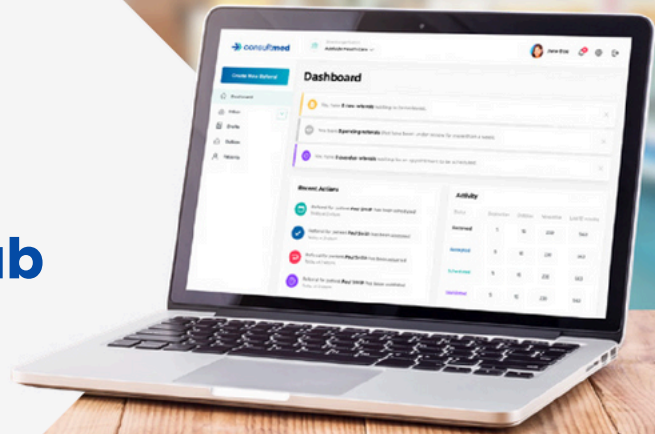
- Step 1:** On your Dashboard, click on New Referrals to view.
- Step 2:** Review the new referral and click 'Accept referral' to triage
- Step 3:** Triage by category and add an internal note
- Step 4:** Provide Advice & Guidance back to the Referrer and Patient/Carer
- Step 5:** Review the acknowledgement and click on 'Submit' to accept the referral.



[How to return a referral](#)

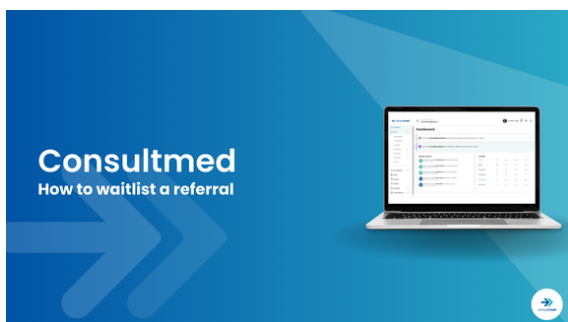
- Step 1:** On your Dashboard, click on New Referrals to view
- Step 2:** Review the new referral and click 'Return referral'
- Step 3:** Provide Advice & Guidance to the Referrer and Patient/Carer
- Step 4:** Review the acknowledgement and click on 'Submit' to return the referral

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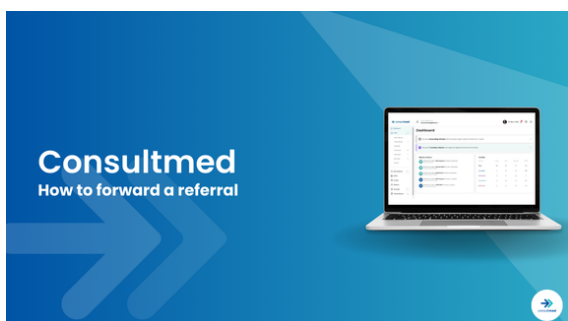
How to schedule a referral

- Step 1:** On your Dashboard, click on the 'Accepted' folder. Select the referral to be scheduled.
- Step 2:** Review the referral and click 'Schedule'
- Step 3:** Complete triage and schedule an appointment
- Step 4:** Review the acknowledgement and click on 'Submit' to schedule the referral



How to waitlist a referral

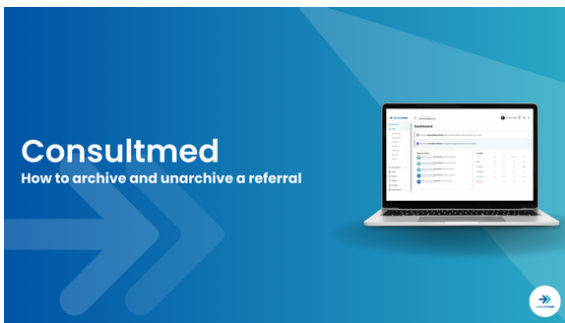
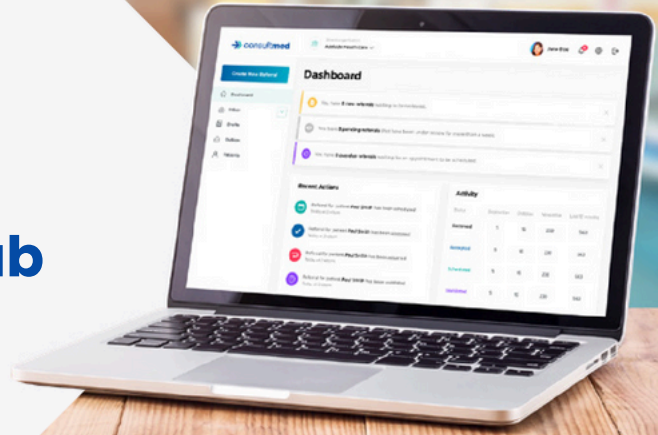
- Step 1:** On your Dashboard, click on the 'Accepted' folder. Select the referral to be waitlisted.
- Step 2:** Review the referral and click 'Schedule'
- Step 3:** Complete triage and waitlist an appointment
- Step 4:** Review the acknowledgement and click on 'Submit' to waitlist the referral
- Step 5:** Click on the 'Waitlisted' to review all referrals that have been waitlisted



How to forward a referral

- Step 1:** On your Dashboard, click on New Referrals to view
- Step 2:** Review the new referral and click 'Forward referral'
- Step 3:** Filter by categories to refine your search
- Step 4:** Choose an appropriate healthcare provider from the Directory of Services.
- Step 5:** Send a message to the new recipient.
- Step 6:** Provide Advice & Guidance to the Referrer and Patient/Carer
- Step 7:** Review the acknowledgement and click on 'Submit' to forward the referral

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[How to archive and unarchive a referral](#)

Archive

On your Dashboard, click on any folder. You will see the relevant referrals appearing under this folder.

Step 1: To archive a referral, click the side menu and select 'Archive'

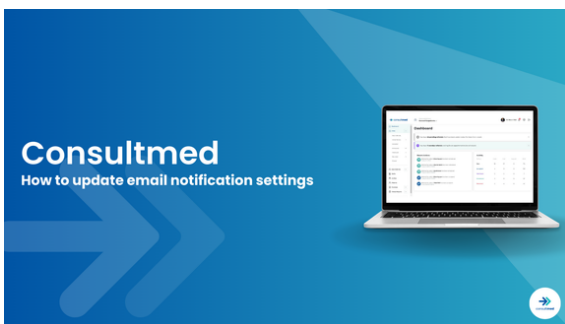
Step 2: Click on the 'Archive' folder to view all referrals that have been archived

Unarchive

Step 1: In your 'Archive' folder, select the referral to be unarchived

Step 2: To unarchive a referral, click the side menu and select 'Unarchive'

Step 3: To view an unarchived referral, click the folder corresponding to the referral's status, such as 'accepted' or 'scheduled'.



[How to update email notification settings](#)

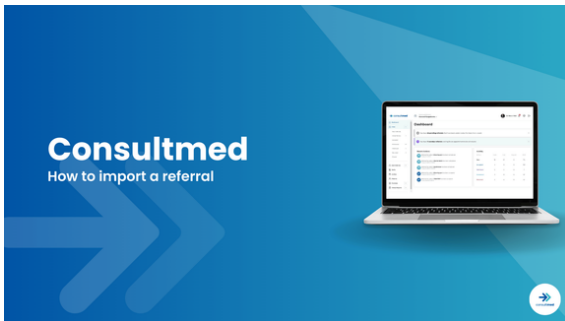
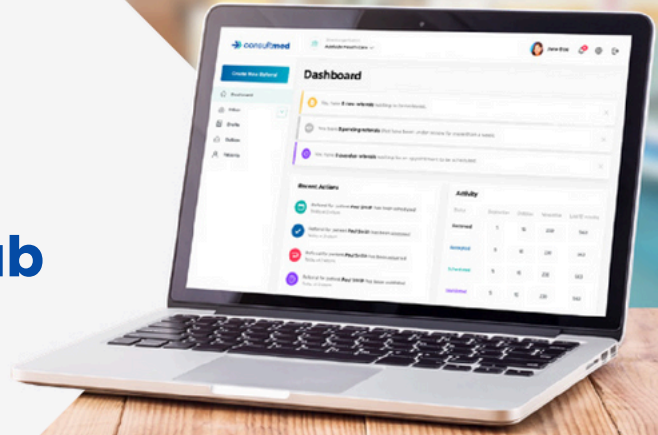
Step 1: Once logged in, click on the gear icon located in the upper-right corner of the screen.

Step 2: Click 'email notifications' in the settings menu

Step 3: Review and customise the email notification settings for referrals and reports.

Step 4: Complete updating your notifications and click 'Save changes'

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How to import a referral

Step 1: Go to 'Inbox', and select 'New' folder then click 'Import Referral'

Step 2: You can either manually import a referral or go to 'Queue' to import emailed or faxed referrals into Consultmed.

Step 3: Review the referral details in your 'Queue.'

Step 4: Click 'Import & Transform' to use Consultpilot AI to import the referral.

Step 5: Choose to import the emailed referral and/or any attachments.

Step 6: Click 'Confirm and Import' to transform the referral using Consultpilot AI into a digital, structured format.

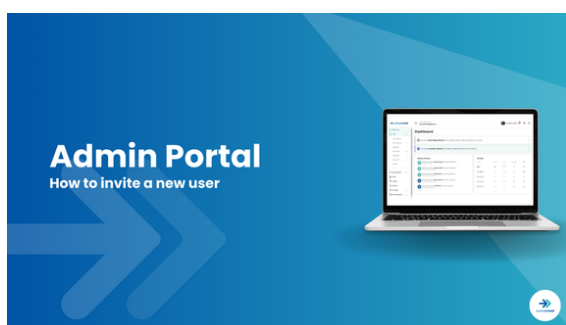
Step 7: Add referral details like the date, specialist, or referral period.

Step 8: Click 'Import Referral' to submit it to Consultmed. The referral will now appear in your 'New' folder.

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Admin Portal



How to invite a new user

Step 1: Go to 'Admin Portal' by selecting 'Settings' (the little cog wheel in the top right) and then 'Admin Portal.'

Step 2: Click '+ Invite New User'

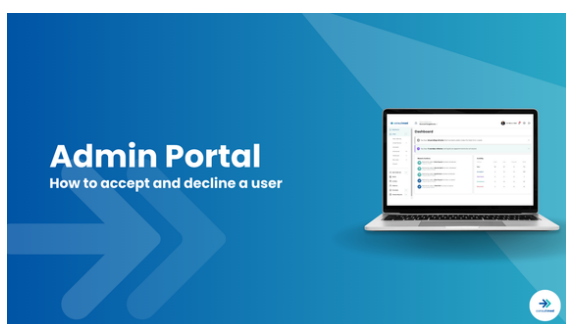
Step 3: Search by first name, last name, or email for a user with an existing Consultmed account in your organisation.

Step 4: If you can't find the user, click '+ Invite' to invite them to create a new Consultmed account.

Step 5: Enter the user's details and role, then click Next.

Step 6: Review and assign permissions based on their role and your workflows.

Step 7: Click 'Send Invite' to complete the process. You'll be notified that the invite has been sent.



How to accept and decline a user

Accept a user

As an Account Holder or Super User, you'll receive requests from new users to join your Establishment in Consultmed.

Step 1: To manage these requests, click 'Go to Admin Portal', log in, and you'll be directed to the 'Admin Portal'.

Step 2: In the 'Admin Portal', new user requests will appear at the top of your 'All Users' list until you address them. Click 'View Request' to check the new user's details and assign their permissions based on their role.

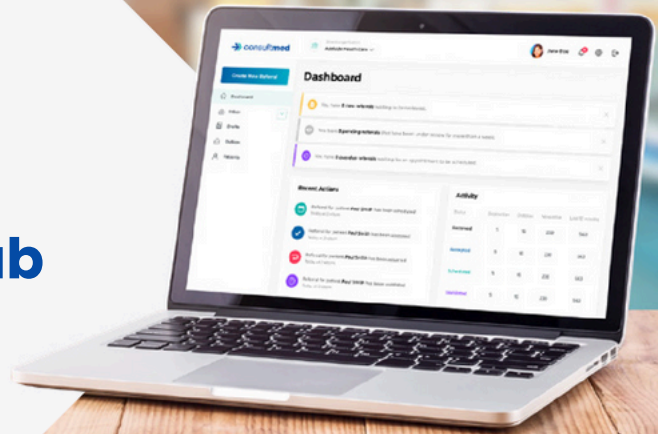
Step 3: Click 'Approve' to accept the user. They will receive an email and can then log into Consultmed.

Decline a user

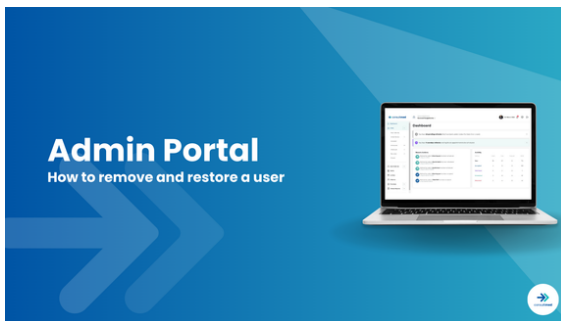
Step 1: Click 'View Request' again to review. If the user is unknown or inappropriate, click 'Decline.'

Step 2: Confirm your decision by clicking 'Decline' again.

Welcome to the Consultmed Training Hub



Admin Portal



[How to remove and restore a user](#)

Remove a user

Step 1: Find the user you want to remove in your Establishment in Consultmed.

Step 2: Click the three grey dots next to their name to review their details or update their status.

Step 3: Select 'User Management'

Step 4: To remove them, click 'Remove User.'

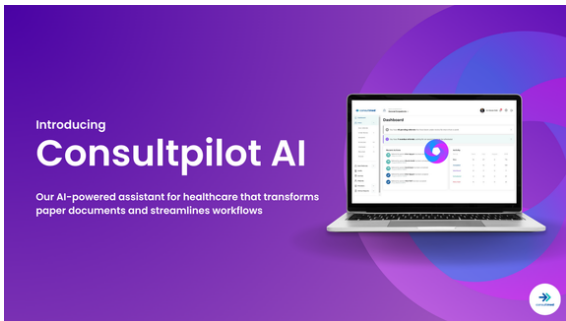
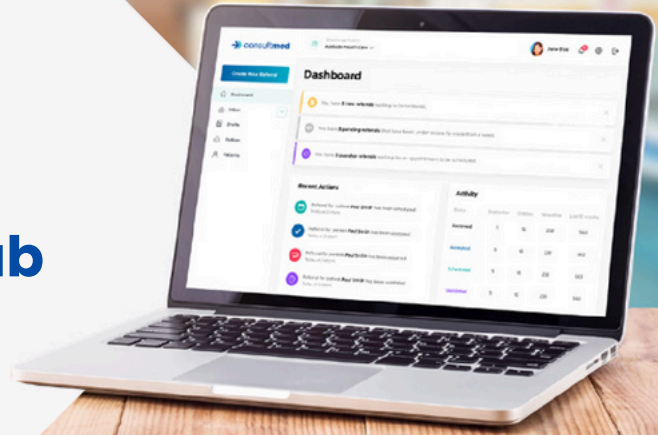
Step 5: Confirm by clicking 'Remove User' again.

Restore a Removed User

Step 1: To restore a removed user, go to 'Deactivated Users' and click 'Restore User.'

Step 2: Confirm by clicking 'Send Invitation.'

Welcome to the Consultmed Training Hub



Consultpilot AI

Workflow: Digital referral management in Consultmed

Step 1: Upload the PDF or Word referral letter that you have received via fax, email or post.

Step 2: Transform your paper and fax documents into an accurate, structured and easily accessible digital record.

Step 3: Choose which healthcare provider will receive this referral in our integrated Directory of Services.

Step 4: Seamlessly transform personal demographic and clinical data in less than 30 seconds.