

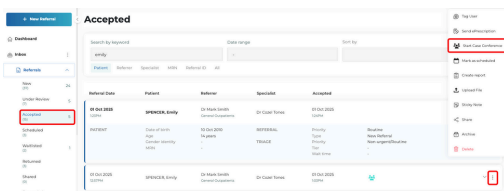
How to Start or Join a 'Case Conference'

Step 1: Log in to your Consultmed account.

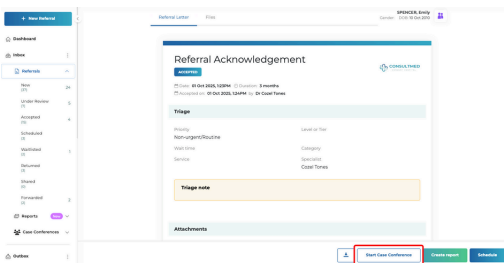
Step 2: Navigate to the referral you'd like to start a case conference for. You can start a case conference for referrals in the **'Accepted'**, **'Scheduled'**, and **'Waitlisted'** folders.

There are two ways to start a case conference:

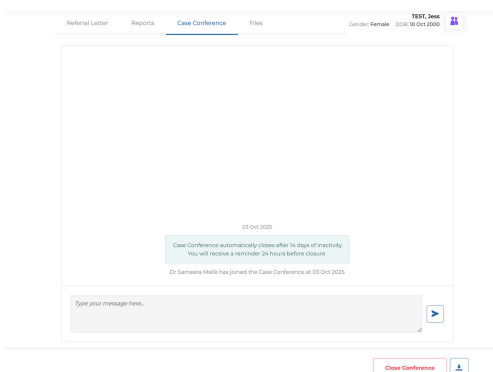
Option 1: Select the three grey dots on the right-hand side of the referral and select **'Start Case Conference'**.



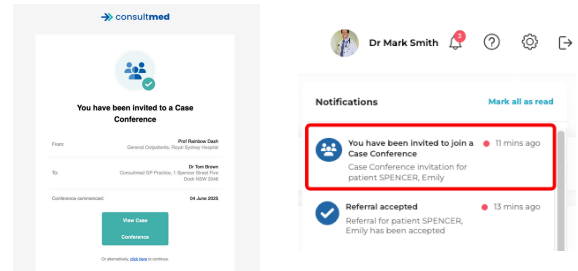
Option 2: Open the referral and click the **'Start Case Conference'** button at the bottom of the referral.



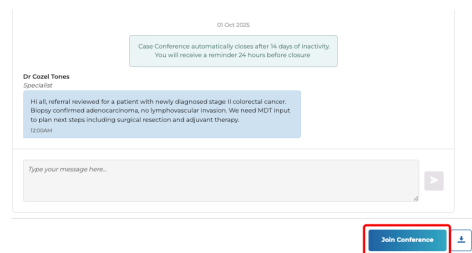
Step 3: Once you agree to the **'Terms and Conditions'**, the case conference window will open, and you can begin sending messages.



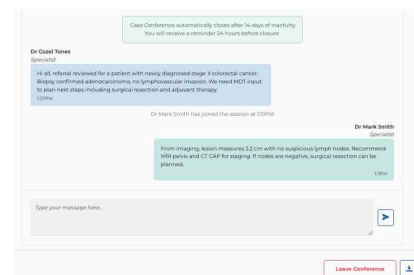
Step 4: As a referrer, you'll receive an email and a dashboard notification when you're invited to join a case conference. From the notifications, you can directly navigate to the case conference.



Step 5: Click **'Join Conference'** and agree to the Terms and Conditions to join the case conference.



Step 7: When the case conference is complete, select **'End Conference'** if you are the person who started it, or **'Leave Conference'** if you joined as a participant.



Note: Case Conference automatically closes after 14 days of inactivity. An email notification is sent after 7 days if there's no activity or unread messages, followed by a final reminder 24 hours before closure.