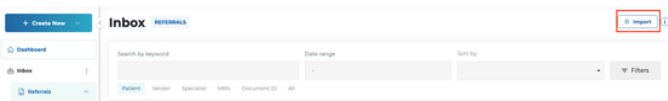


How to Import a Referral using Consultpilot AI

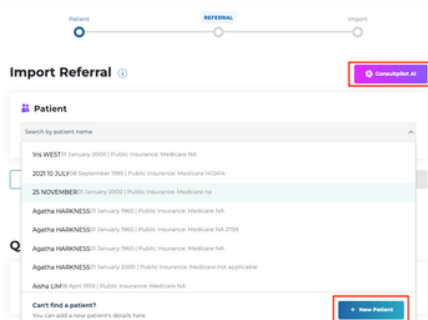
- **Consultpilot AI** is Consultmed’s next-generation AI healthcare assistant that transforms paper-based referrals and other clinical documents into digital versions
- Our AI agent can process **referrals, discharge summaries, admission notes and outpatient letters** by converting them directly into structured documents in Consultmed, automatically extracting and populating key patient and clinical details
- Consultmed adheres to best practice Australian privacy and data governance principles
- Personal health information is stored locally, encrypted and secured within our Microsoft Azure cloud region in Australia
- Watch a demo of how Consultpilot AI works [here](#).

Step 1: Visit www.consultmed.co and log in to your Consultmed account.

Step 2: Click the **‘New’** subfolder in the side panel under the **‘Referrals’** folder. Click **‘Import referral’** in the top right corner. For more information on importing a referral within Consultmed, refer to our QRG [here](#).



Step 3: To find an existing patient, enter their name in the search bar. To manually add a new patient, click the dropdown menu under **‘Patient’** and select **‘+ New Patient’**.

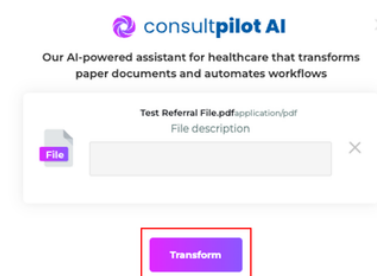


Step 4: Select **‘Consultpilot AI’**.

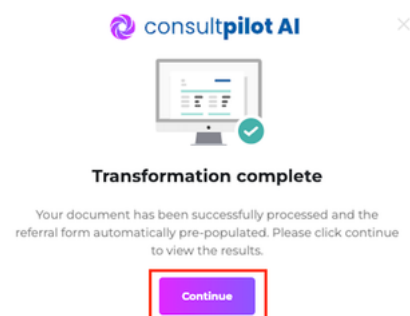
Step 5: Upload the referral letter that you would like to transform using Consultpilot AI. File types accepted: PDF, JPEG, JPG, DOC, DOCX, PNG



Step 5: Once the file has been uploaded, enter the file description and click **‘Transform’**. Consultpilot AI leverages advanced document intelligence to extract text from the document and maps the relevant patient demographic and clinical details into the referral form.



Step 6: Once the transformation is complete, click **‘Continue’**.



Step 7: The patient’s demographic details are automatically populated. Confirm that these details are correct, then click **‘Save patient’**, then click **‘Next Step’**.

Step 8: Acknowledge and agree to the **‘Terms and Conditions’**.

Step 9: Consultpilot AI automatically populates referrer details. Confirm these details and click **‘Save’** to continue.

Step 9: Include relevant Clinical Assessment details and upload any other correspondence, including outpatient letters, discharge summaries and imaging results. The original referral letter is automatically attached.

Step 10: Review and confirm the referral details. Agree to the Terms & Conditions, acknowledging the use of Consultpilot AI to help draft the referral. Customise Tracking & notifications.

Step 11: Click **‘Import Referral’**. This referral will automatically appear in your **‘New’** folder in the left-hand menu, ready to be actioned.