

Welcome to Admin Portal

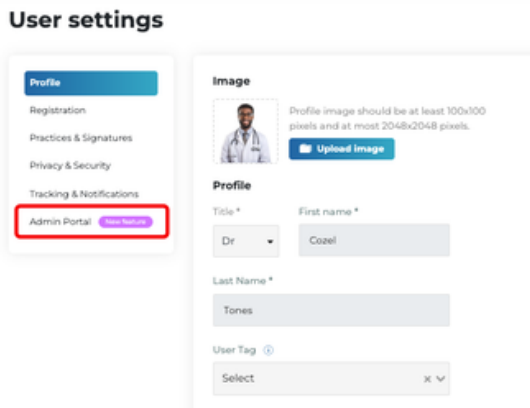
Manage your team's access to Consultmed

Admin Portal is a dedicated section of Consultmed available to Account Holders and Super users, used to manage establishment settings, including user access, permissions and visibility within the platform.

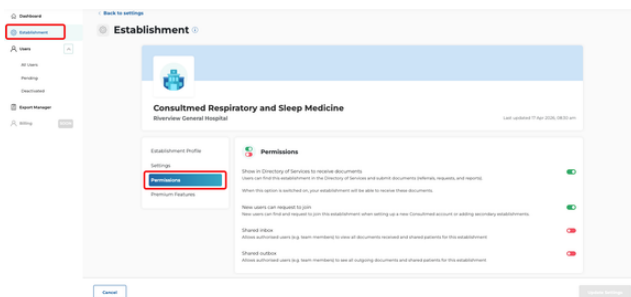
If you create a new establishment, you will be automatically assigned as the **'Account Holder'**. This means any users requesting to join your establishment will require your approval. You can also assign additional Account Holders as needed.

Modify Establishment Settings

Step 1: In your Consultmed account, click the '⚙️' in the top-right corner to open **'User Settings'**. Click **'Admin Portal'**.



Step 2: Navigate to **'Establishment' > 'Permissions'**.



Note: Ensure these settings are configured appropriately to control this establishment's visibility in the directory for receiving documents and to manage new user join requests.

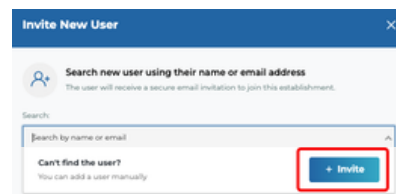
Add a User to your Establishment

Step 1: In your Consultmed account, click the '⚙️' in the top-right corner to open **'User Settings'**. Click **'Admin Portal'**.

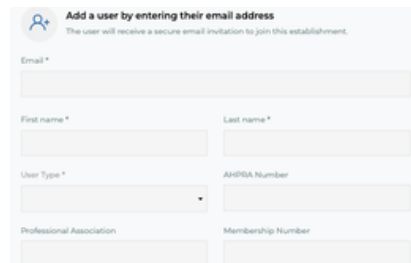
Step 2: Under the **'Users'** tab, select **'+ Invite New User'** in the top right of your screen.



Step 3: Search and invite existing Consultmed users, or select **'+ Invite'** to invite a staff member to create a Consultmed account.



Step 4: Enter their basic details and adjust account permissions.



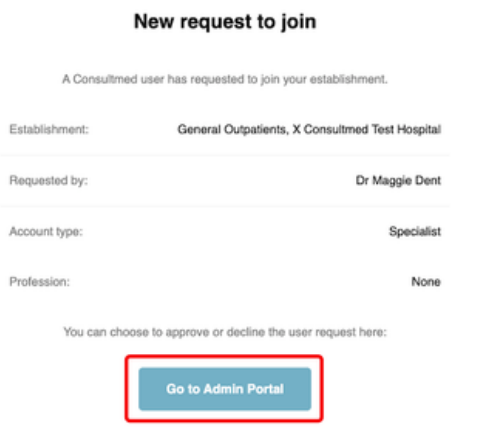
Step 5: The staff member will receive an email invitation to join your establishment.

Note: Once the staff member accepts the invitation, you will be notified via email and in-app.

Accept or Decline a User's Request to Join Establishment

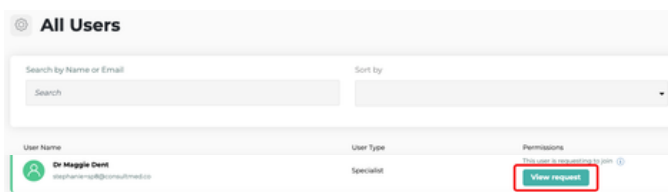
Note: The 'request to join' email is important and needs to be actioned based on your knowledge of the requesting user.

Step 1: From your 'request to join' email, select 'Go to Admin Portal.'



Step 2: You will be directed to the 'All Users' page, where you can locate the new join request.

Step 3: Select 'View request'. A window will appear from the right of your screen.

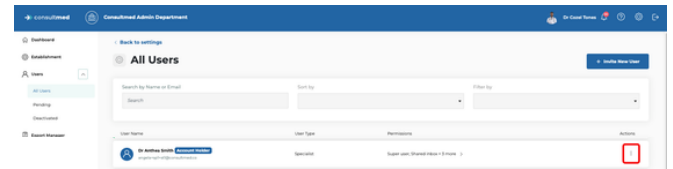


Step 4: Review the request details, adjust account permissions as required and select 'Approve', or 'Decline' the request.

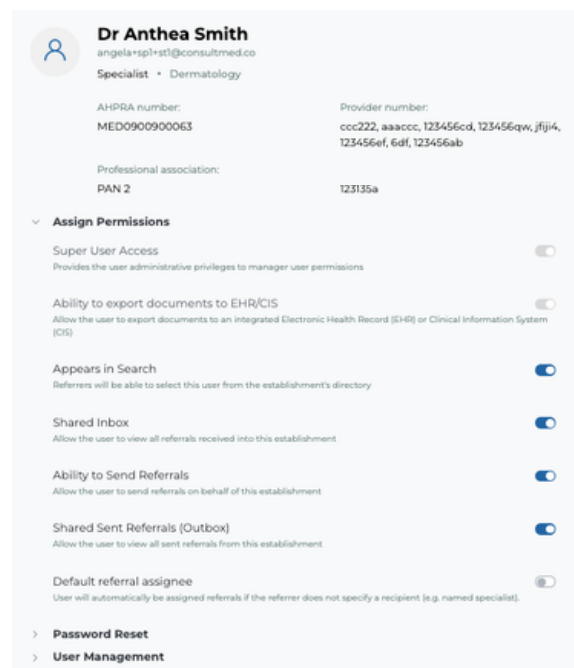
Change a User's Permission Level

Step 1: In your Consultmed account, click the '⚙️' in the top-right corner to open 'User Settings'. Click 'Admin Portal'.

Step 2: Under 'All Users', locate the specific staff member and select the '⋮' on the right under the column 'Actions'.



Step 3: A window will appear on the right of your screen. Navigate to 'Assign Permissions' and toggle 'on/off' the appropriate settings for the user.



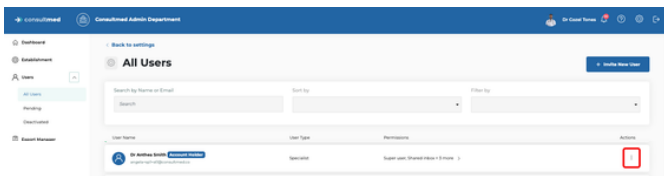
Note: Assigning user permissions is essential to ensure appropriate access, such as viewing all incoming referrals in the shared inbox and the ability to send referrals.

Step 4: Once done, select 'Save' to implement the changes.

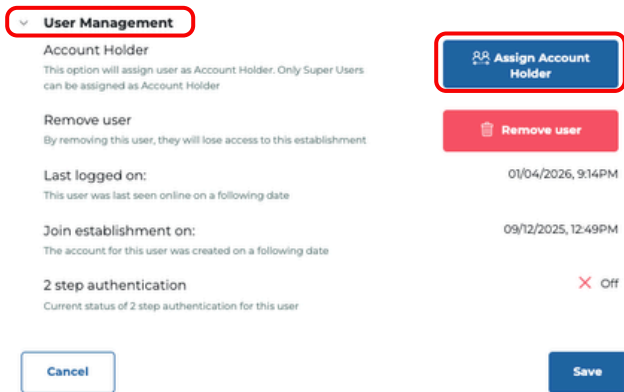
Assign another Account Holder to your Establishment

Step 1: From your **'Admin Portal' > 'All Users'**, locate the specific staff member you wish to assign as an **'Account Holder'** from your Establishment.

Step 2: Select **'⋮'** on the right, under the column **'Actions'**.



Step 3: A window will appear from the right of your screen. Navigate to **'User Management'**, and select **'Remove User'**.

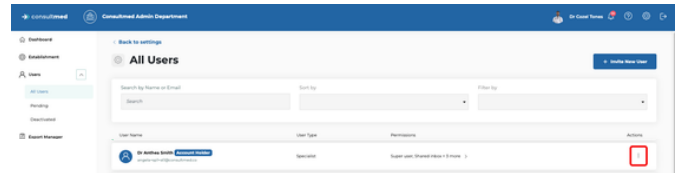


Step 4: Once done, select **'Save'** to implement the changes.

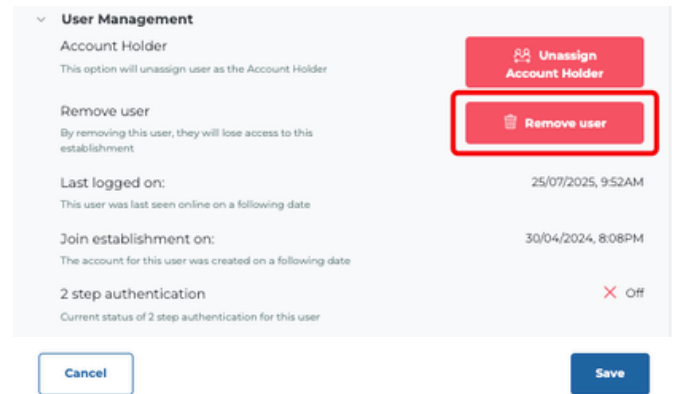
Remove a User from your Establishment

Step 1: From your **'Admin Portal' > 'All Users'**, locate the specific staff member you wish to **remove** from your Establishment.

Step 2: Select **'⋮'** on the right, under the column **'Actions'**.



Step 3: A window will appear from the right of your screen. Navigate to **'User Management'**, and select **'Remove User'**.



Step 4: Once done, select **'Save'** to implement the changes.