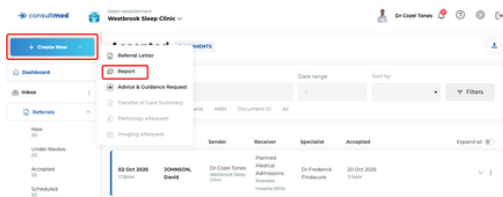


# How to Create and Send a Report (1/2)

Within Consultmed, users can create and send reports to healthcare providers, as well as patients and carers. The Reports feature can be used to securely share a range of common clinical documents, including clinical letters, assessments, patient summaries, and other care related reports.

**Step 1:** Visit [www.consultmed.co](http://www.consultmed.co) and log in to your Consultmed account.

**Step 2:** Select **'Create New' > 'Report'**.

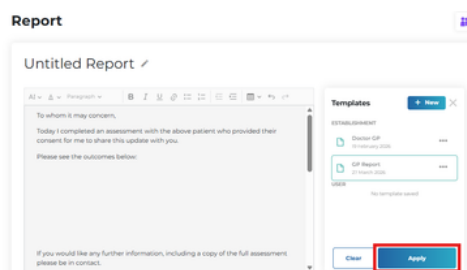
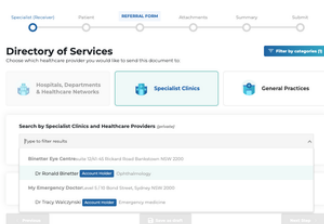


**Step 6:** Rename the report by clicking the pen icon beside **'Untitled Report'**.

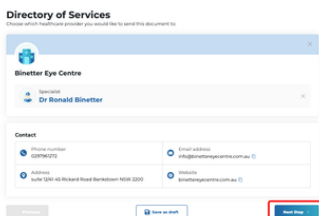
**Step 7:** Complete the report. You may include clinical assessment, additional information, and relevant examination findings. Alternatively, you may upload your report as an attachment in Step 8. Click **'Next Step'**.

**Note:** You can also create and save a template for future use. To use an existing template, select the appropriate template and click **'Apply'**. Once applied, you can customise it to suit your report.

**Step 3:** Select where you would like to send the report in the Directory of Services.



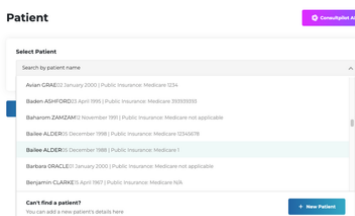
**Step 4:** Select the healthcare provider, then click **'Next Step'**.



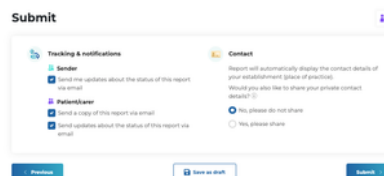
**Step 8:** Attach any relevant documents, including pathology, imaging, or other correspondence. Click **'Next Step'**.

**Step 9:** Review the report and confirm the details. Click **'Next Step'**.

**Step 5:** 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 10:** Customise **'Tracking & Notifications'** and **'Contact'** settings by selecting the check boxes to choose whether you and/or the patient receive status updates about the report via email. You can also select whether to send a copy of the report to the patient.



**Alternative Step:** Use Consultpilot AI to automatically transform your paper and fax documents into a digital document. Click [here](#) for more information.

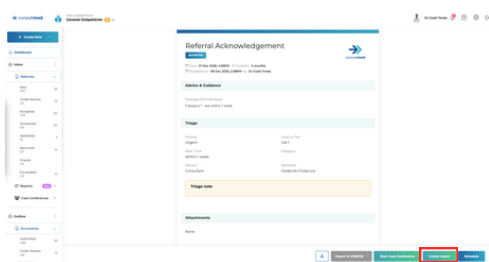
**Step 11:** Submit the report. This report will be in your **'Outbox'**, under **'Reports'**, then **'Submitted'**. It will automatically be moved to the respective folders when actioned by the receiver (e.g. **'Under Review'**, **'Reviewed'**).

## How to Create and Send a Report (2/2)

Within Consultmed, reports can also be created in response to a referral or Clinical A&G request that has been actioned. This allows users to send a structured report linked to the original referral or Clinical Advice and Guidance request, which can be securely shared with the referring healthcare provider and, where appropriate, the patient or carer.

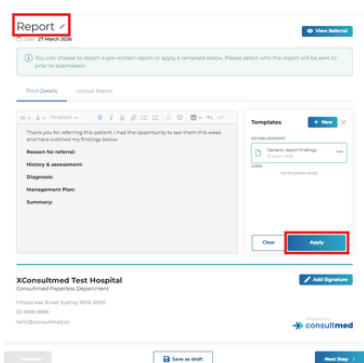
**Step 1:** Visit [www.consultmed.co](http://www.consultmed.co) and log in to your Consultmed account.

**Step 2:** Click **'Inbox' > 'Referrals'**. Select the referral you wish to attach a report. You can search for referrals by keyword or date-range. Click **'Create report'**.

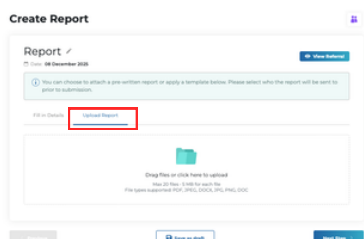


**Step 3:** Rename the report by clicking the **'pen icon'** beside **'Untitled Report'**.

**Note:** You can also create and save a template for future use. To use an existing template, select the appropriate template and click **'Apply'**. Once applied, you can customise it to suit your report.

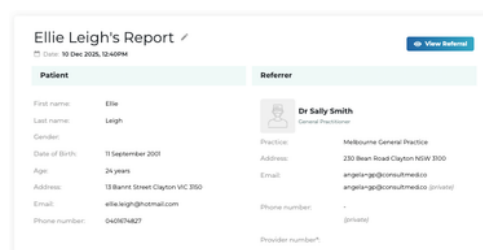


**Alternative Step:** Upload your Word, PDF or image report directly.



**Step 4:** Attach any relevant documents, including pathology, imaging, or other correspondence. Click **'Next Step'** to proceed.

**Step 5:** Review the report and confirm the patient and referrer's details.



**Step 6:** Add any additional healthcare providers you would like the report sent to by clicking **'+ Add recipient'**, and use the **'Patient/Carer'** button to send a copy to the patient or carer. Agree to the **'Terms and Conditions'**, then select **'Submit'**.



**Step 7:** Submit the report. This report will be in your **'Outbox'**, under **'Reports'**, then **'Submitted'**. It will automatically be moved to the respective folders when actioned by the receiver (e.g. 'Under Review', 'Reviewed').