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Consultmed Settings

How do I switch between multiple workplaces?

To navigate between your different workplaces, click on the **Select Establishment** drop-down at the top left-hand side of the page. From there, you can choose your specific practice, department or specialist clinic to send and review referrals.

If you have not yet registered your secondary workplace(s), select the **Settings** icon in the top right-hand corner. Select **Practices & Signatures › Add secondary practice**. Search for or enter the details of your workplace.

I am a GP. Does Consultmed integrate with my Practice Management Software?

Consultmed has existing integrations with many of the common PMS, including Best Practice and Medical Director making it easier for healthcare providers to send and receive referrals seamlessly via Consultmed.

If your practice uses **Best Practice** and would like to enable our integration via **Halo Connect**, your **Practice Manager** will need to set up a Consultmed account. Once the setup is complete, all GPs in the practice can be added, and the integration will function seamlessly at the server level.

Next Steps:
- **Installation Guide**: BP Halo Connect Installation Guide
- **Setup Video**: Watch the Video

If you are not the practice manager, please let them know to initiate the setup process.

If your practice uses **Medical Director**, you can connect your PMS with Consultmed using our **Sanro Integrator App**. Each GP in the practice will need to download the app on their individual computers.

Next Steps:
- **Installation Guide**: Medical Director Sanro Installation Guide
- **Setup Video**: Watch the Video

For other PMS, we have several integrations planned for release including Gentu, Medirecords and Zedmed. Keep an eye on our newsletters for the latest updates as we roll out these enhancements.

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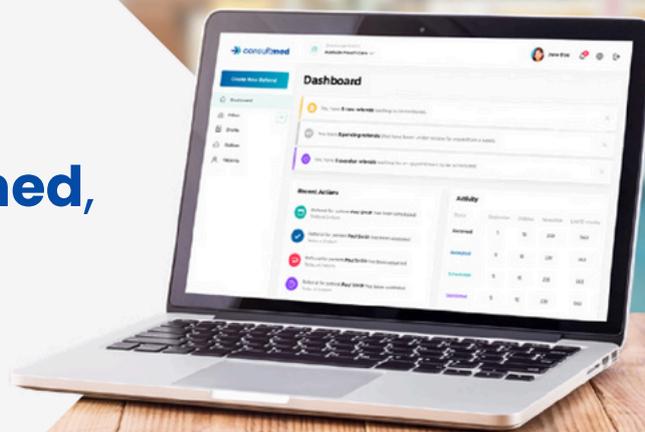
User Account & Password

What is my Practitioner Account?

Your Practitioner Account is your personal space in Consultmed, where you can send referrals and access our library of brief, user-friendly tutorials. Locate your *Practitioner Account* under the **Select Establishment** drop-down list and your name.

Any referrals sent from your Practitioner Account will only have your details listed as the referrer and won't be connected to a specific Establishment or place of work. This will allow you to send referrals if you are awaiting account verification from your place of work in Consultmed.

How do I change my password?

Select the **Settings** icon ⚙ in the top right-hand corner. Select **Password > Change Password**. Alternatively, click **Forgot Password?** on the log-in page.

You will receive a reset link by email. Note that this link will expire after 24 hours.

For any difficulties, you can reset your password again or visit **www.consultmed.co/contact/** for assistance.

How do I update my personal or professional details (such as APHRA number, provider number or contact details)?

Select the **Settings** icon ⚙ in the top right-hand corner. From there, you can access and edit various user settings, such as contact details, registration information (APHRA number, provider numbers), places of practice, password, and email notification preferences. Within **Practices & Signatures** , you can add or edit your practices and the accompanying signature.

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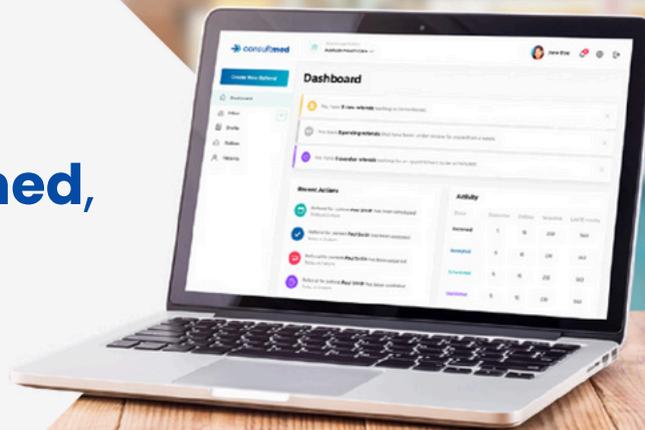
User Account & Password

How do I create a second account with the same AHPRA number if I have a different email address for my different workplaces?

Select the **Settings** icon ⚙ in the top right-hand corner. Select **Profile** and **Add secondary email**. After submitting your secondary email, you will receive a verification code. Enter this code to associate your new email with your current account. This action will create a new Consultmed account tied to the secondary email, which will be automatically connected to your existing AHPRA number.

How do I add multiple provider numbers if I work at multiple practices?

You can add up to 10 provider numbers. Select **Settings** ⚙ in the top right-hand corner. Select **Registration** and the **Provider Number** drop down list. Select **+ Add** and enter your new provider number. Select **Save** and number will be added to your saved provider number list. If you want to clear the field and return to your existing provider list, select the red cross.

When creating a referral, click on **Change** on the referral preview page and select the relevant provider number.

How do I update my account from doctor in training to specialist?

To update your professional status on Consultmed, visit **www.consultmed.co/contact/**. Our support team will process the update to your profile and send you a confirmation once the changes have been made.

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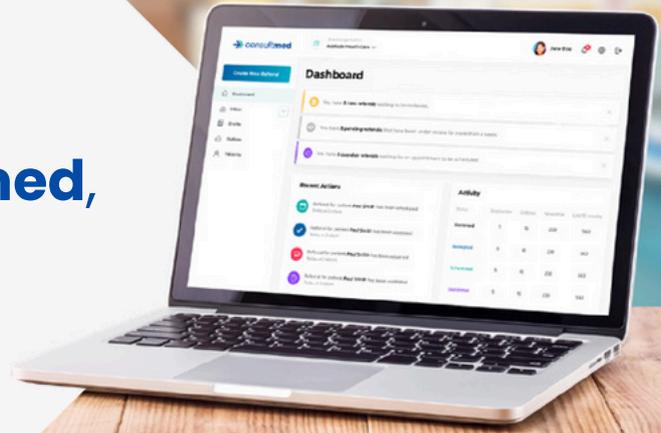
Clinical Documents

How do I proceed with a referral if I can't find a specific hospital department or specialist clinic in the Directory of Services?

If the hospital department or specialist clinic you're seeking isn't listed in our Directory of Services, they may not yet be active on the Consultmed platform. However, you can still refer to them by starting a new referral and selecting the **Can't find a healthcare provider** option. Enter the provider's details manually and complete the referral process. Your referral will then be sent as a secure email.

How are my referrals stored in Consultmed?

All referrals processed through Consultmed are stored in compliance with health policy regulations. While you can archive or delete referrals, they will remain stored in the relevant sub-folders within Consultmed and can be accessed at all times.

How do I access my sent referrals after one of my previous workplaces has been removed in Consultmed? Where do these removed workplaces appear?

To view your previous workplaces, known as *Establishments* , click on the **Select Establishment** drop-down list at the top left-hand side. Select **Closed** . An alternative drop-down list with your removed *Establishments* will appear. You can select these *Establishments* to view any of your sent referrals, however you will not have access to the full Establishment.

If you would like to re-join a previously removed *Establishment*, navigate to **Settings**, and select **Practices & Signatures**. Each inactive establishment is also listed here. You may select **Request to join again**. If you select this option, an email with your request will be sent to the *Establishment's Account Holder* and *Super Users* to verify your employment with the *Establishment*.

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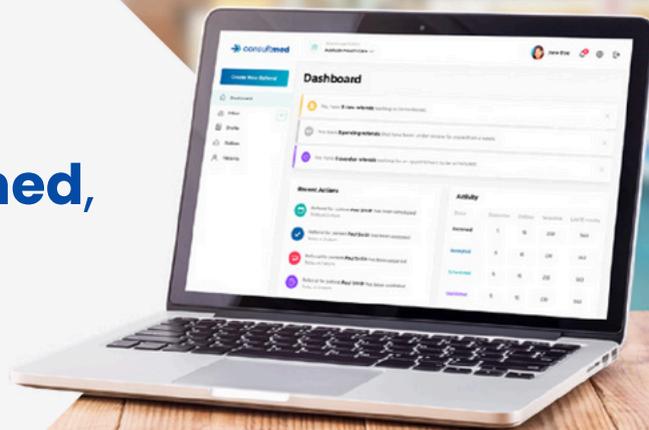
Onboarding & Training

Our practice has multiple GPs. Can we share the same login?

Each Consultmed account is linked to one email per user, so doctors cannot share a single email for registration. We recommend that each GP create an individual account to access our integration tools, which connect directly to the Best Practice or Medical Director. These integrations allow patient information to be automatically imported when sending referrals, eliminating the need for manual entry. If you are managing the setup, you can create an account for yourself and use the **Admin Portal** to invite doctors to join the same establishment. This allows you to manage staff access and permissions efficiently.

As a practice manager, the first step is to create an account using our web portal here by entering your email and selecting **Create Account**. When prompted, please select the **Practice Owner or Manager** option and follow the instructions to set up your account for your practice.

After creating your account, you can invite providers to your practice via the **Admin Portal** in the **Settings** (the little cog wheel in top right of your screen) section. Navigate to the **Users** tab and select **Invite New User** in the top right corner of your screen. You will be notified in-app once they accept your invitation, and they will appear on your **All Users** list.

Do you offer training for new users of Consultmed?

Consultmed is designed to be easy to use. However, should you require guidance, your *Practitioner Account* features a selection of concise, easy-to-follow tutorials. Located under **Select Establishment** in the dropdown menu, your *Practitioner Account* is listed as your name.

We are also ready to assist. For personalised online training, please submit a request through the enquiry form on our website by visiting **www.consultmed.co/contact/**.

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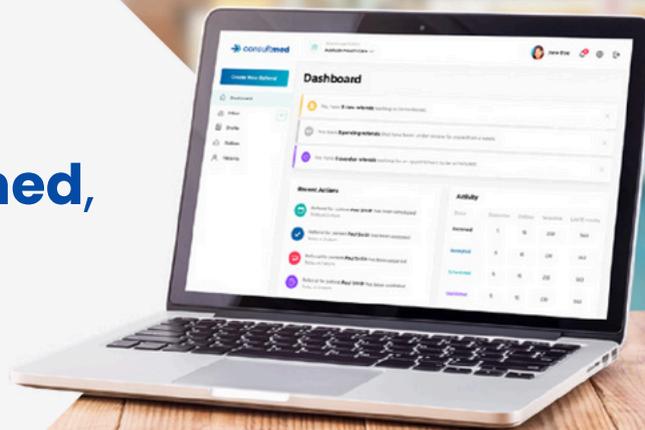
Admin Portal

What is Admin Portal?

The Consultmed *Admin Portal* is an arm of the Consultmed platform only available for select users. That is *Account Holders* and *Super Users* connected to a specific *Establishment*. *Admin Portal* allows these users to manage access to Consultmed for their team (invite new staff, remove staff and edit account permissions), adjust *Establishment* details (email, phone, address), and manage reporting and subscriptions (if applicable).

Locate *Admin Portal* in **Settings > Admin Portal**.

Who has access to Admin Portal?

Not all users have access to *Admin Portal* for their *Establishment*. Only *Account Holders* and *Super Users* have access to these additional permissions. Locate *Admin Portal* in **Settings > Admin Portal**.

You will only have access to *Admin Portal* for *Establishments* where you are assigned as an *Account Holder* or *Super User*.

What is an Establishment?

Your *Establishment* is your place of work – your practice, specialist clinic or hospital department. You can have more than one Establishment connected to your Consultmed account. Switch between these via the **Select Establishment** drop-down list at the top left-hand side.

How do I update Establishment details?

Your *Establishment* is your place of work – your practice, specialist clinic or hospital department. You can have more than one Establishment connected to your Consultmed account. Switch between these via the **Select Establishment** drop-down list at the top left-hand side.

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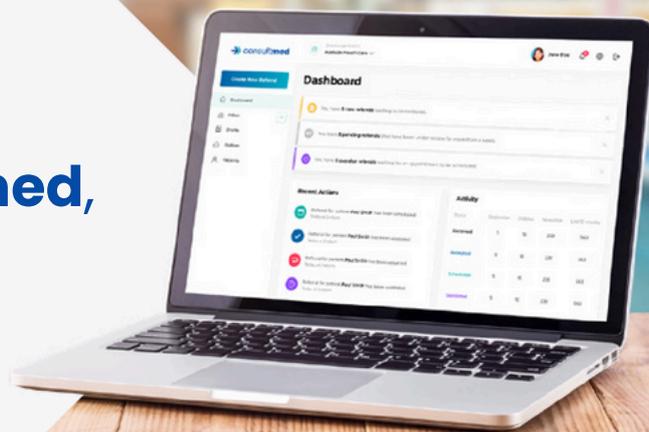
Admin Portal

I am an Account Holder, what does this mean?

You are an *Account Holder* if you either a) created your *Establishment* as part of your account registration, or b) have been assigned as the Head of Department or Service Lead. This is important, as you will be named on any unnamed referrals received into your service.

As an *Account Holder* , you have access to the *Admin Portal* to manage access to Consultmed for your team (invite new staff, remove staff and edit account permissions), adjust your *Establishment* details (email, phone, address), and manage reporting and subscriptions (if applicable).

You can assign another member of your team to be the *Account Holder* before leaving your *Establishment*. Account Holders can be clearly identified in the *Admin Portal* by a blue tag beside their name under **All Users**.

I am a Super User, what does this mean?

You have been allocated as a *Super User* by your *Establishment's Account Holder*. This person is often your Head of Department or Service Lead.

As a *Super User* , you have access to the *Admin Portal* to manage access to Consultmed for your team (invite new staff, remove staff and edit account permissions), adjust your *Establishment* details (email, phone, address), and manage reporting and subscriptions (if applicable).

Each *Establishment*, or place of work, can only have two staff members assigned as *Super Users*. *Super Users* can be clearly identified in the *Admin Portal* by a green tag beside their name under **All Users**.

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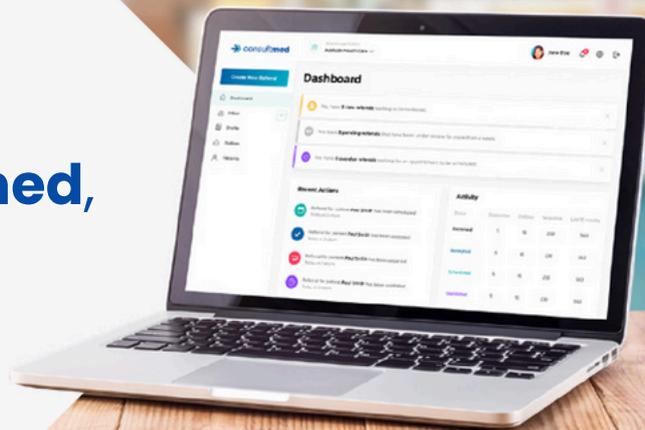
Admin Portal

How do I add staff to my Establishment in Consultmed?

Under the **Users** tab, select **+ Invite New User** in the top right of your screen. You have the option to search for and invite existing Consultmed users, or select **+ Invite** to invite a staff member to create a new Consultmed account. Once you have entered their basic details and adjusted account permissions, the staff member will receive an invitation to join Consultmed and your *Establishment* via email.

Account permissions for a staff member can be edited at any time by the *Account Holder* or *Super User* . Permissions include access to the shared inbox and appearing for referrers to refer to.

Once the staff member accepts the invitation to join your *Establishment* , you will be notified via email and in-app. The staff member will also appear in your **All Users** list.

How do I remove staff from my Establishment in Consultmed?

Under **All Users**, locate the specific staff member you wish to remove from your Establishment. Select the **three grey dots** on the right under the column **Actions**. A window will then appear from the right of your screen. Navigate to **User Management** > **Remove User.**

Once you have confirmed the change, the user will appear under your **Removed** folder in *Admin Portal*. Their removed user's details will remain there for your records.

How do I update a staff member's permissions in Consultmed?

Under **All Users**, locate the specific staff member and select the **three grey dots** on the right under the column **Actions**. A window will then appear from the right of your screen, navigate to **Assign Permissions** and toggle **on/off** the appropriate settings for the user. Once done select **Save** to implement the changes.

A user's permissions can be viewed at a glance beside their details on the **All Users** page.

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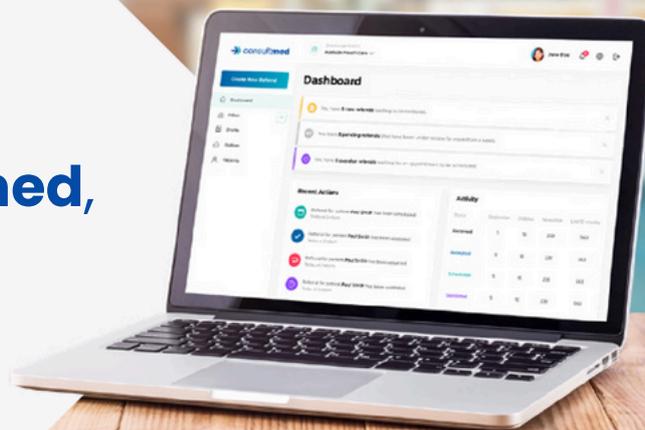
Admin Portal

How do I reset a staff member's password in Consultmed?

Under **All Users**, locate the specific staff member and select the **three grey dots** on the right under the column **Actions**. A window will then appear from the right of your screen, select **Password Reset**.

Once you have selected **Password Reset** the staff member will receive an email to the email address connected to their Consultmed account to reset their password.

How do I see the staff I have removed from my Establishment in Consultmed?

All removed users are listed under your **Removed** folder in *Admin Portal*.

If you wish to reinstate access for a staff member to your *Establishment* , navigate to your **Removed** folder, locate the account and select **Restore User** .

The staff member will then receive a new invitation to the email address connected to their Consultmed account. The invitation to join will remain under **Pending Requests**, until the user acts on the invitation they have received.

What happens when I remove a staff member, or they leave my Establishment?

When a staff member is removed or departs from your Establishment, they immediately lose access to all referrals and patient lists associated with your workplace. They will be notified via email about this change. For administrative tracking, the individual's details will be listed in the **Removed** folder within **Admin Portal**.

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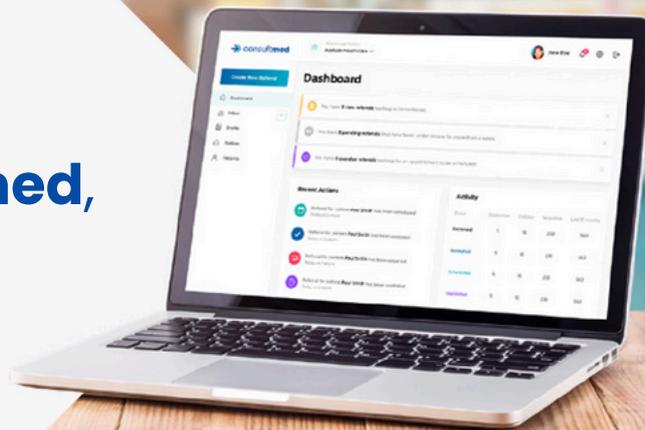
Admin Portal

What does the Pending Requests folder mean?

The **Pending Requests** folder holds all the invitations you've sent to potential new staff members to join your *Establishment* which are yet to be responded to. Once an invitee accepts the invitation, their status will update, and they will appear in the **All Users** folder.

I have received an invitation to join a new Establishment in Consultmed. What does this mean?

An *Establishment* is inviting you to join their service in Consultmed. The *Establishment* may be your new place of work or new rotation.

To accept or decline the invitation, follow the prompts within the invitation email, log into Consultmed and select **Accept** or **Decline**. If you accept, the new *Establishment* will appear in your **Select Establishment** drop-down list in the top left-hand side of the platform. If you decline, the *Establishment* will be disconnected from your Consultmed account immediately.

I have received an email from a staff member requesting to join my Establishment in Consultmed. What does this mean?

This is an important email that needs to be actioned. You have received this email as you are either an *Account Holder* or *Super User* for your *Establishment*, and are required to either accept or decline the request based on your knowledge of the requesting user as a member of your team.

It is important to action these requests as they impact the requesting user's ability to send referrals from your *Establishment*. If you accept a request, you have the option to update the staff member's account permissions for your *Establishment*. Permissions include access to the shared inbox and appearing for referrers to refer to.

You will receive reminder emails if this request is not actioned.

To view which members of your team can manage these requests, select **All Users**. You can identify the *Account Holder* and *Super Users* for your *Establishment*. Both of these roles have the authority to accept or decline requests.

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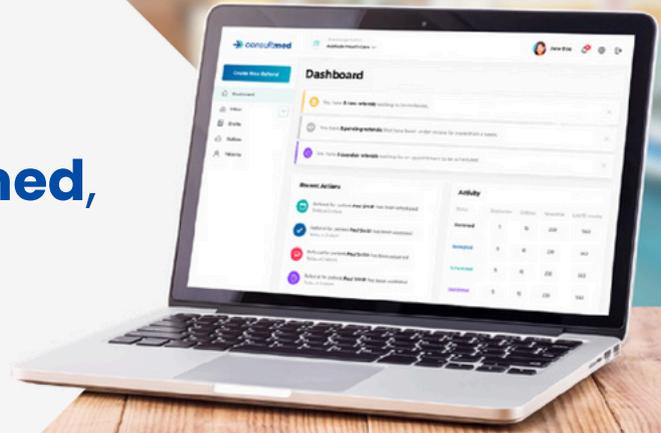
Patient & Carer

What does it mean if I receive a referral from a Patient/Carer?

Select *Establishments* have access to a Consultmed Patient Portal, which has been customised to meet the referral requirements of the service to enable patients/carers and health or care professionals the ability to submit referrals. These referrals are flagged as submitted by 'Patient/Carer'.

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