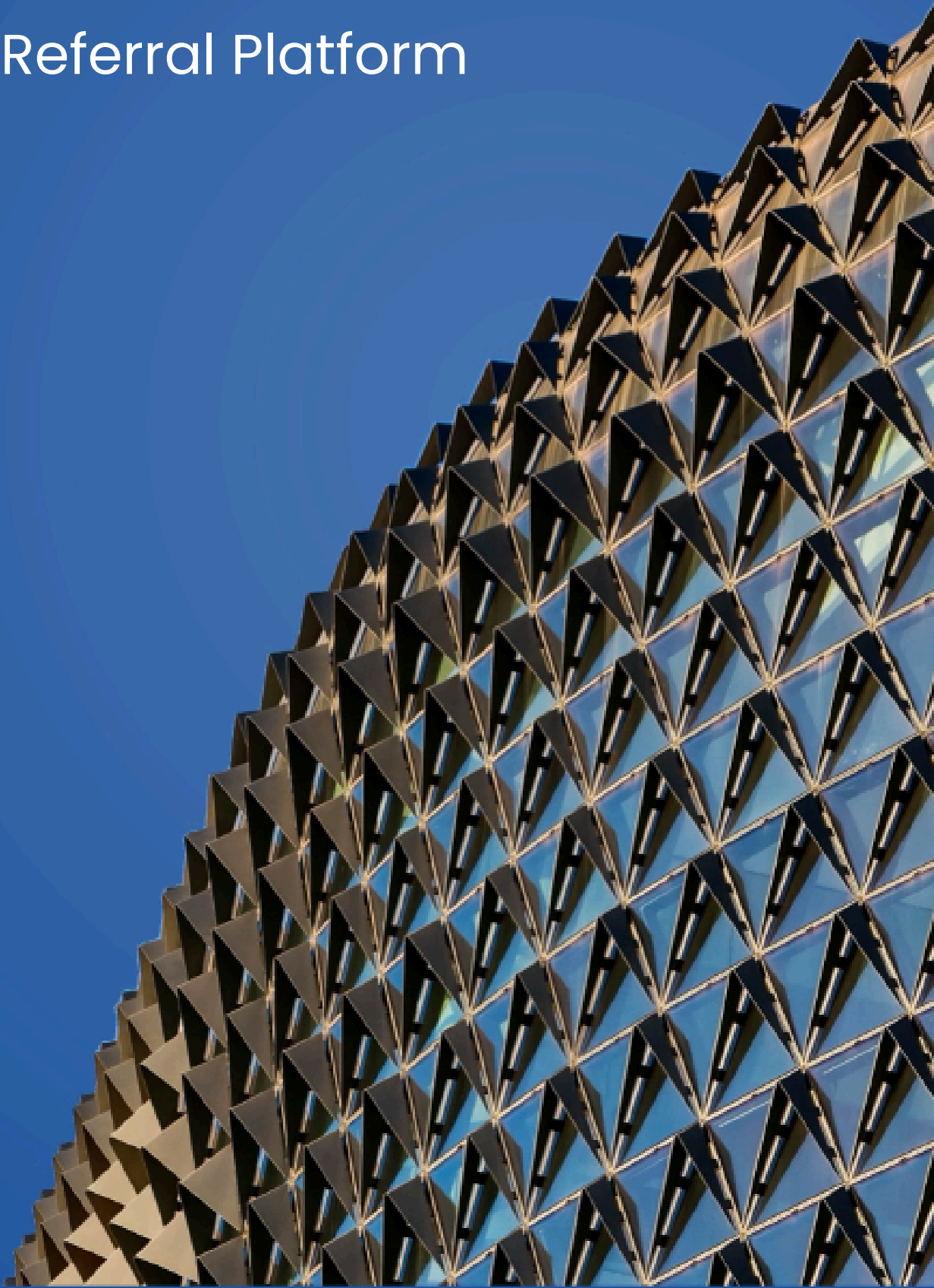




Welcome Pack

Digital Referral Platform





Get started with Consultmed



Welcome

We are delighted to have your practice on board.

Consultmed is a secure, easy-to-use digital referral platform designed to simplify how you manage referrals. Designed with healthcare professionals, it integrates with major Practice Management Software (PMS) so you can save time, reduce paperwork, and improve communication across care teams.

This Welcome Pack will guide you through everything you need to get started, including account registration, PMS integration set up and how to manage your establishment.

Key Points

We recommend that each user creates their own individual Consultmed account.

In Consultmed, your clinic or service location is called an “**establishment**”.

- Each user can have one primary establishment and add secondary establishments if they work across multiple locations.
- **New users:** Before creating a new establishment during the account creation process, check if your workplace already has one set up within the platform. If it does, request to join the existing establishment so that all referrals are managed in one place.
- **Existing users:** You can invite colleagues to join your existing establishment to streamline referral management.

Consultmed Role Based Access

- You will be designated as an **Account Holder** if you created the establishment during your account registration OR if you were assigned by an existing Account Holder.
- Account Holders can assign a **Super User** to help coordinate referral management and user permissions.
- Both Account Holders and Super Users have access to the **Admin Portal** (see step 3), where they can manage team members, assign permissions and maintain the clinic’s user access settings.



Get started with Consultmed



Getting Started

1. Create your user account

- Follow the instructions [here](#).
- Be sure to select the correct profession from the options displayed
- Register using your individual professional email address and details

2. Set up integration with your existing Practice Management Software

Consultmed integrates with several major PMS. Follow the installation guides and view the videos to set up Consultmed with your PMS:



Best Practice

- [Installation Guide](#)
- [Setup Video](#)
- [How to Send a Referral via Best Practice](#)



MedicalDirector Clinical

- [Installation Guide](#)
- [Setup Video](#)
- [How to Send a Referral via MD Clinical Smartbar](#)



Gentu

- [Installation Guide](#)
- [Setup Video](#)

3. Onboard your team and manage your Establishment

Account Holders and Super User roles have access to the **Admin Portal** within Consultmed.

Within the Admin Portal you can:

- View all users linked to your establishment, add or remove users, accept join requests and assign roles
- Control permissions and clinic details by editing user access (e.g. shared inbox/outbox, directory visibility etc.)
- Update your Establishment's name, description and contact information
- Follow the instructions [here](#).

Need Help?

Our friendly support team is here to help every step of the way

- www.consultmed.co/contact
- Email: helpdesk@consultmed.co
- [Frequently Asked Questions](#)