

Set up and support your practice's case conferences

A step-by-step handbook for practice managers – from your first-day setup to preparing patient rosters, managing consent, and getting each conference ready for your GPs. All the behind-the-scenes work, none of the clinical detail.



🕒 ~15 min read ≡ 6 parts 📄 Updated for the current app

WHAT'S INSIDE

Jump to what you need

Each part stands on its own – come back any time and head straight to the task in front of you.

Your role, in plain English



The GP hosts the conference, you help them – we make it easy for you

Medicare-funded case conferences are hosted by the coordinating GP, between them and the patient's clinical team. **Conference.care does the admin** – we assemble the clinical team, provide the software and look after consent – and we only come to you when we truly need to, once we've exhausted every other option. This guide walks you through the parts you'll touch, so you can help your GPs whenever it counts.

Here's the quick version – what's yours to do, and everything we take care of for you.



What you'll do

- ✓ See every conference at your practice at a glance
- ✓ Add and update your practice's patients
- ✓ Help prepare a roster when needed – add, swap or remove patients
- ✓ Open a conference and load it on the GP's device (e.g. a clinic iPad)
- ✓ Keep an eye on billing and Medicare prep
- ✓ Invite GPs and manage who's a practice admin

✓ What we take care of for you

- The scheduling and admin legwork
- Assembling the patient's clinical team for each conference
- The software and the technical side
- Consent – for the most part (we only escalate to you as a last resort)
- Cancelling or rescheduling – raise it with us and we'll sort it

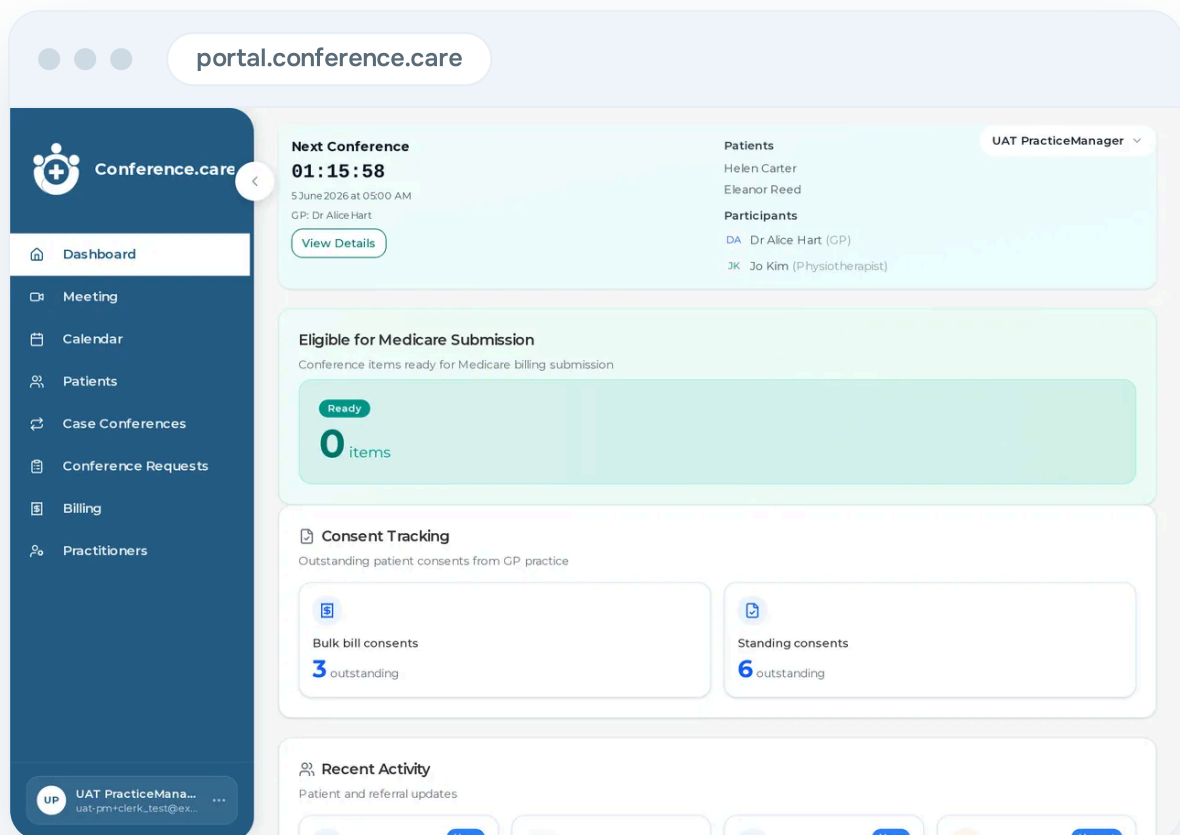
Finding your way around

Your menu sits on the left. Here's what each item is for.

1

Open the app and sign in

Go to your Conference.care login and sign in with your practice email. You'll land on your **Dashboard**.



Your menu. Eight places to work – we'll visit each one.

2**Know what each menu item does**

Eight places to work – here's the one-line version of each.

Dashboard

Your day at a glance

Meeting

Open a live conference

Calendar

Every conference at your practice

Patients

Your practice's patient roster

Case Conferences

Recurring weekly meeting blocks

Conference Requests

Requests coming in from your GPs

Billing

Consent & Medicare prep

Practitioners

The GPs at your practice

PART 3 · ON MEETING DAY

Get the conference ready for your GP

You don't need to attend the conference yourself – the discussion happens between the GP and the patient's clinical team, who we help to assemble. Your job on the day is simply to make sure the GP can start on time.



The shared-iPad scenario

If your practice uses a shared device for telehealth – say an iPad in the consult room – you can open the scheduled conference from your own account and load it **as the GP**, so it's up and ready. Drop the device in front of the GP at the start time, and they take it from there.

Your job – get it ready

Behind the scenes, before it starts

- Open the scheduled conference from your account
- Use **Join as GP** to load it on the device the GP will use
- Hand the device over at the scheduled start, ready to begin

Not your job – the conference itself

Once it's loaded, you step away

- The GP and the clinical team run the discussion
- You don't need to take part once it's loaded
- Patients don't usually attend – only if the GP invites them

PART 1 · FIRST-TIME SETUP

The welcome wizard

The first time you sign in we'll walk you through a short setup – about five minutes. You can come back and change any of it later.

1

Confirm your practice's GPs

We pre-load the GPs we already know about. Check the list, add anyone we've missed, and remove anyone who has moved on. A name is all we need for each – add an email too and we'll send them an invite to set up their own login.

Use **Add GP** (it becomes **Invite GP** once you enter an email), or **Save & invite** to add an email to a GP you've already listed.

The screenshot shows a web browser window with the address bar displaying 'portal.conference.care/onboarding'. The page is titled 'Step 1 of 4' and includes a 'Having trouble? Get Help' link. The main content area is titled 'Confirm your practice's GPs' and contains the following elements:

- A sub-header: 'These are the general practitioners at Riverside Medical Centre. Add any that are missing, or remove anyone who is no longer at the practice.'
- A list of two GPs, each with a name, a placeholder email, and a trash icon for removal:
 - Dr Alice Hart (uat-gp+clerk_test@example.com)
 - Dr Ben Cole (uat-gp2+clerk_test@example.com)
- An 'Add a GP' section with two input fields:
 - Name: 'Dr Jane Smith'
 - Email (optional): 'jane@practice.com'
- A note: 'Don't have the GP's email yet? Add them now with just a name — you (or the GP) can add the email later. When you do add an email, you can use the GP's practice or personal address; they'll need access to that inbox to receive a two-factor authentication (2FA) code when they sign in.'
- An '+ Add GP' button.

At the bottom of the page, there is a 'BACK' link on the left and a blue 'Next →' button on the right.

Step 1. Confirm who your GPs are.

2

Set up conference blocks – optional

If a GP likes to hold their case conferences at a regular time, tell us here – a recurring one-hour block each **week** or **fortnight**. It helps us line everything up. Not sure yet? Skip it and set it up any time.

Set up block, then **Add another** for more.

portal.conference.care/onboarding

Step 2. Optional – a regular weekly slot per GP.

3

Agree to the Terms of Service

A quick read, then tick to confirm you're authorised to accept on your practice's behalf.

portal.conference.care/onboarding

Step 3. Read and agree.

4

Tell us about your telehealth setup

One question: is your practice equipped to perform telehealth consultations by video? Add a note if there's anything we should know – then finish, and you'll land on your dashboard.

portal.conference.care/onboarding

Step 4. Your telehealth readiness – then you're in.



That's the setup done

From here, the day-to-day is ours – assembling teams, scheduling, looking after consent. The rest of this guide is simply the tools you've got for when you want to check in or lend a hand.

PART 2 · EVERYDAY TASKS

The tools you've got

Most days there's nothing for you to do – we're running the admin in the background. But when you want to check on something or lend a hand, here's what's at your fingertips.

Your dashboard

Your home screen is a read-only snapshot that everything's on track: the next conference with a countdown, what's eligible for Medicare, where consent stands, and recent activity at your practice.



portal.conference.care

Your dashboard. A glance is usually all you need.

Adding and updating patients

When a new patient should be on your practice's books, you can add them yourself.

1

Open Patients and start a new patient

From **Patients**, choose to add a patient.

2

Enter their details and choose the owning GP

Name, date of birth and contact details – and pick the **owning GP**, so we know whose patient they are.

3

Adding several at once?

Import a CSV instead – just include each patient's owning GP, and we'll bring them all in together.



portal.conference.care/patients

Add one patient.



portal.conference.care/patients

Or import a CSV.



You don't need to chase consent

We look after consent for each patient. On the patient's record you'll just see where it's up to – the badges in Part 5 explain each one.

Helping prepare a conference roster

If a GP wants a patient added, swapped or taken off an upcoming conference, you can do it from the Calendar.

1

Open the conference

Find it on the **Calendar** and open its details.

2

Add a patient

Start typing and pick from the list. The picker shows who's **available**, who's already **booked**, and who isn't **eligible** yet – so it's clear who you can add.

3

Swap, remove, or add a note

Replace one patient with another, take a patient off, and jot any note the GP should see.



portal.conference.care/calendar

Preparing a roster. Add, swap or remove patients in a slot.

Need a conference moved or cancelled?

Rescheduling and cancelling are ours to handle – there's a team to reshuffle behind every change. Just raise a request (or tell us) and we'll take care of it.



portal.conference.care/calendar

Ask, don't action. Raise the change and we'll do the rest.

Keeping an eye on billing, and managing your GPs

Two more places you've got access to – one to keep an eye on the Medicare side, one to manage the GPs at your practice.

Billing & Medicare

We prepare the billing for each conference and look after consent. The **Billing** page lets you see where things stand – which items are eligible for Medicare submission, and the consent and Medicare status against each patient.



portal.conference.care/billing

Billing at a glance. See what's ready, without doing the legwork.



Marking an item billed

If you ever need to mark an item as billed on a GP's behalf, you can – and we record it as done on their behalf, so the audit trail stays clear.

Managing practitioners

The **Practitioners** page is yours – it's how you keep your practice's GP list current.

1

Add or invite a GP

Add a GP individually, or import several from a CSV. Add their email and we'll invite them to set up their own login.

2

Fill in a missing email

Added a GP without an email earlier? Add it here and we'll send the invite.

3

Grant practice-admin to a colleague

Decide who else at the practice should have practice-admin access – grant or remove it any time.



portal.conference.care/practitioners

Your GP roster. Add, invite and set who's a practice admin.

Patient call history

Open any patient to see their case-conference history – past conferences, and whether each was recorded and finalised.



portal.conference.care/patients

Call history. A patient's conference timeline.

Who does what, the badges & FAQ

Who does what

● Conference.care

- › The admin and scheduling
- › Assembling the clinical team
- › The software and tech
- › Consent – for the most part
- › Cancellations & reschedules

● The GP

- › Hosts and runs the conference
- › Decides who's involved
- › Leads the clinical discussion
- › Claims the Medicare item

● You – practice admin

- › Confirm GPs & first-time setup
- › Add and update patients
- › Help prepare a roster when asked
- › Load a conference onto a device
- › Keep an eye on billing

Consent & Medicare badges

You'll see these status badges around the app. We manage most of this – the badges just keep you in the loop.

Consented

Consent has been obtained.

Pending

Consent hasn't been recorded yet.

Escalated

Declined

We've asked your practice to help obtain it – the rare last resort.

The patient declined consent.

Medicare · Complete

The patient's card details are on file.

Medicare · Requested

We've asked for the missing details.

Medicare · Missing

Card details aren't on file yet.

Common questions

Do I need to attend the conference?



I can't see a patient I expected.



The "Join as GP" button isn't showing.



I need a conference moved or cancelled.



A GP hasn't received their invite.



Need a hand?

We're here. Email support@conference.care and we'll sort it out.