

**1** Login to Implant Concierge and click on the patient's name to open the case.



**2** On the middle of the page, you will notice 6 tabs. Click the fourth tab labeled "Partners" and click the "Case Partner" button.



**3** A small window will pop up at the top of your screen. Enter the partners' email and click the blue "Add Partner" button.



**4** If the case partner already has an account in Implant Concierge, this case will automatically show up under their “Current Cases”. If the case partner does not have an Implant Concierge account, the box will expand asking for more information. Please fill out the partner name, phone number, and the type of partner you are adding. Once completed, click the “Send Invite” button. An invitation will be sent to them via email. They will need to create their own account in Implant Concierge and will have access to this case to upload files or make changes on your behalf.



The screenshot shows a web form titled "Case Partner" with a blue header. Below the header, there is a prompt: "Please enter the email of the partner you would like to add below." The form contains five input fields: "Email" (with "sample@gmail.com" entered), "First" (with "First Name" entered), "Last" (with "Last Name" entered), "Phone" (with "Phone" entered), and "Partner Type" (a dropdown menu with "Choose Partner Type" selected). At the bottom right of the form, there are two buttons: "Cancel" (with a close icon) and "Send Invite" (with a plus icon).