



User Guide to Cohort On-line Management Referral Tool

Occupational Health have the Online Management Referral Process to enable Managers to complete all Management Referrals Online.

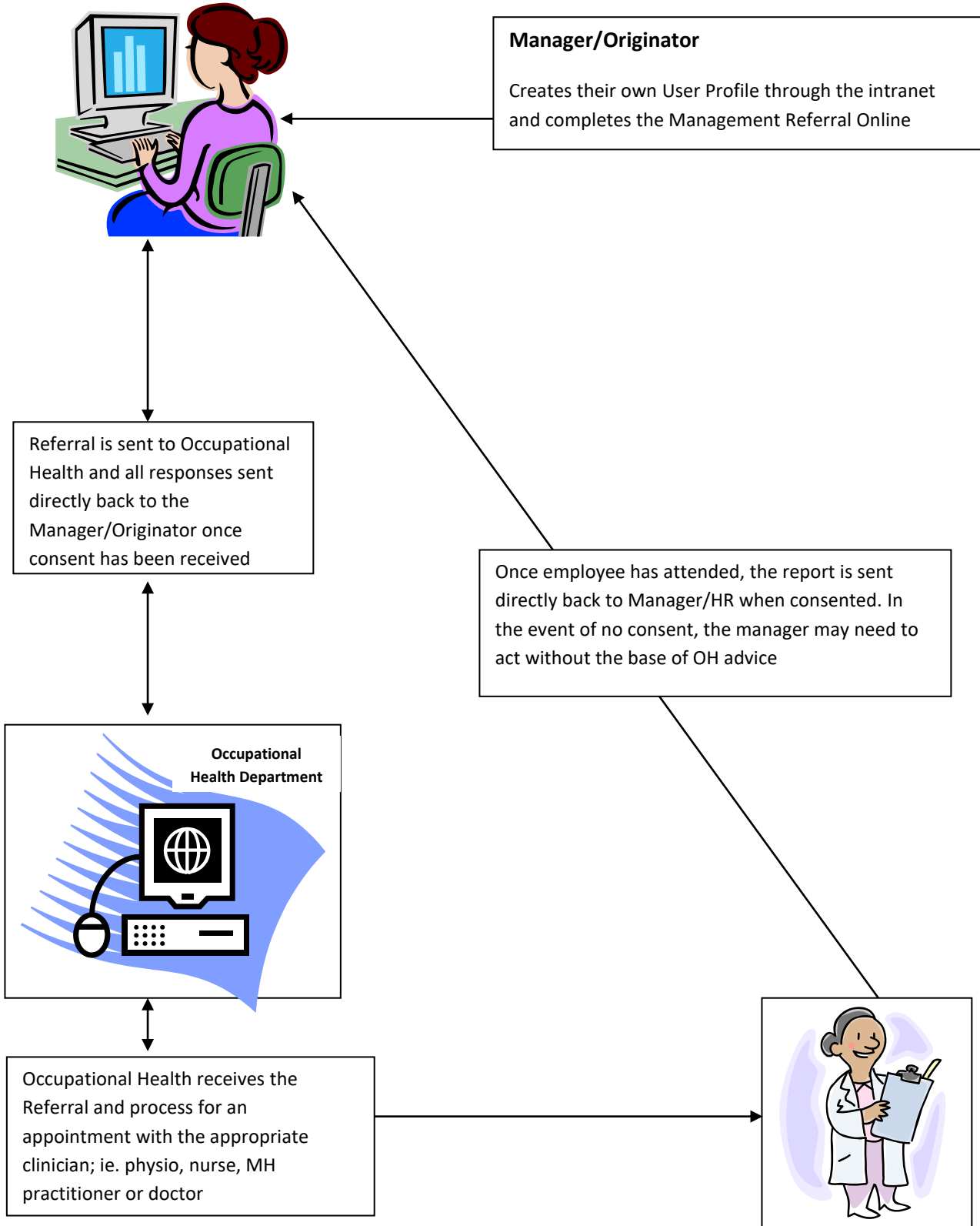
By logging onto the intranet through the Occupational Health Share point page, you can log directly onto the Occupational Health system, create your own unique user profile and start the referral process.

This will not only enable a quicker turnaround for all referrals from initial receipt and triage at Occupational Health to an appointment being made and a report being produced, but also enable you the Manager to track and control the trail of all your referrals on one screen.

The benefits are:-

- no need to chase up referrals you will be able to see where each referral is up to by logging on to your user profile through the intranet
- once you start using this system all future referrals will be stored for you to access at any time
- once the referral has been submitted to occupational health, reassurance that it is "in the system" and being dealt with
- instant response reports from clinician's as these will be produced and emailed to the Manager and HR whilst the employee is in the appointment (consent permitting).

How the Online Management Referral Process works



How to create a referral

As with all referrals please ensure your employee is aware and will be given a copy on completion (instructions on how to do this are on the bottom of page 7)

Log onto the intranet, and onto Occupational Health's Sharepoint page under OneHR:

The screenshot shows the Occupational Health intranet homepage. At the top, there is a calendar for October 2022 and a 'Read more...' link. Below the calendar, there are several sections: 'Workforce Advisory Service' with contact information (01253 9 51600), 'Mandatory Training' with a 'Read more...' link, and 'Non-Medical Appraisals' with a 'Local Appraisal system hub' button. A central banner for 'eDMS' (electronic Document Management System) states: 'The trust is ready to make our next big step into a more modern, streamlined and digitised way of working and this begins with phasing out as many paper records as safely possible. Click to find out more about the eDMS project and how it will impact you and your way of working.' Below this, there are two orange and blue buttons: 'Doctors Appraisal and Revalidation: Click here to access the system' and 'Doctors eJob planning: Click here to access the eJob Planning system'. The 'oneHR' logo is circled in red.

This screenshot shows the Occupational Health SharePoint page. The page title is 'Occupational Health' and it includes a 'Meet the Team' section. The 'oneHR' logo is visible in the top right corner. The page content includes a navigation menu on the left, a search bar, and a list of 'PAGES IN THIS SECTION' such as 'Needstick Injuries', 'Pillbox', 'Thevacas', 'Referrals and Guidance', 'Discontinued Activities and Events', and 'Occupational Health FAQs'. The 'Meet the Team' section lists the Occupational Health Physician (Dr G Ferguson Locum), Head of Department (Sun VIVE), Occupational Health Nurse Manager (Kerrie Chesters), Sister (Clare Partington), and Sharon Gray.

This screenshot shows the 'Referrals and Guidance' SharePoint page. The page title is 'Referrals and Guidance' and it includes sections for 'On-Line Referral Form' and 'General Points'. The 'oneHR' logo is visible in the top right corner. The 'On-Line Referral Form' section includes a link to the online referral form and a note: '*Please ensure that you select the correct HR email address in the Atisgood HR User box so that HR receives a copy of every referral*'. The 'General Points' section includes a note: '*Please be aware that all staff are allowed to see their Occupational Health Records and including anything that is written by you on the referral form.*'

Under Occupational Health, click on the link in the share point page "Referrals and Guidance, then "On-line Referral Form".



A box will open as above . First time users will have to create a Manager User Profile.

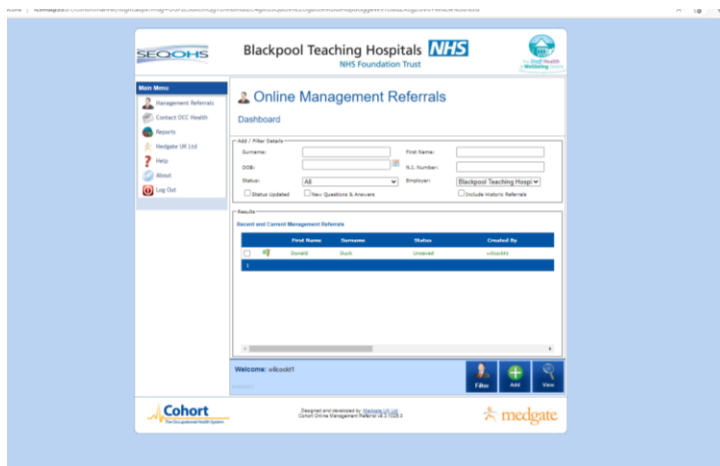
Make a note (secure) of the username and password as this will be used for all future referrals.

- ❖ **Do you work in HR?** – This will be a restrictive view of the dashboard screen to “read only”, however it will allow a copy of the response to be received (if consented).
- ❖ **Employer** – It is essential that the correct Employer is chosen as this will affect which referral form you complete and the response form you receive back from the doctor (e.g. external clients will fill in a different form)

Once all details are inputted correctly, click Create which will register you as a user.



Log in all your details and you are ready to start inputting your referral.



The Online Management Referral allows you to search for both current online management referrals and add new ones.

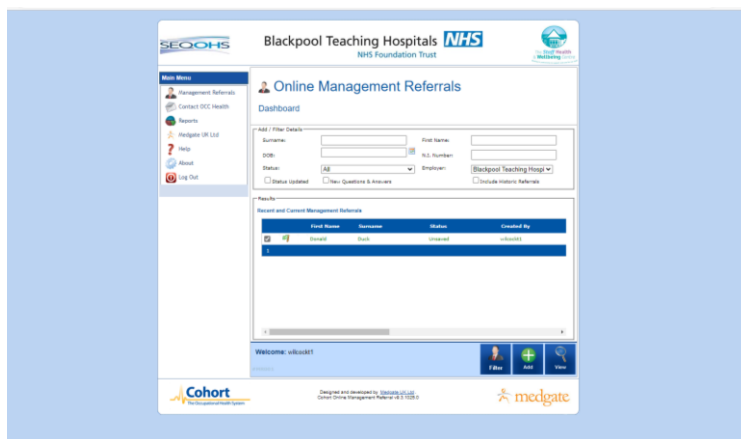
Current Referrals

To undertake a search first enter the appropriate search criteria, either surname, DOB the more information you have the quicker the search, then click the Search button at the bottom of the screen.

If once the search is complete, there is a + icon alongside the name, this means that referrals already exists for this employee and by clicking on the + will expand the record to show these.

Creating a New Online Management Referral

To add a new referral , first select the employee record and click on Add button.



Pick the **Management Referral Form** questionnaire to fill in and once selected the questionnaire will load.

Complete all relevant fields on the referral (N.B. some fields are mandatory so will not allow you to move on unless complete).

The screenshot shows the 'Online Management Referral' questionnaire form. The form is titled 'Questionnaire' and includes instructions: 'Please complete the relevant questions, noting you can save the referral at any time by clicking on the Save button. Once complete, please submit the referral by clicking on the Submit button at the end of the questionnaire.' The form fields are as follows:

- Title*: Dropdown menu (selected: Donald)
- First Name*: Text input (Donald)
- Surname*: Text input (Duck)
- Headline/ Profession Name*: Text input
- Address*: Text input
- Post Code*: Text input
- Gender*: Radio buttons (Male selected)
- DOB*: Text input (19/07/1974)
- N.I. Number*: Text input
- Home Tel*: Text input
- Work Tel*: Text input
- Cell/ Mobile*: Text input
- Mobile Tel*: Text input
- Email*: Text input
- Priority*: Radio buttons (Normal selected, High unselected)
- Assigned MR User*: Dropdown menu
- Referred Doctor*: Text input
- Referrer Name*: Text input
- Reason*: Dropdown menu
- Referral Organisation: ukhsd11
- Employer*: Dropdown menu (Blackpool Teaching Hospitals selected)
- Directorate Location*: Dropdown menu
- Directorate*: Text input
- Site*: Text input
- Department*: Text input
- Post Title*: Text input
- Date Commenced*: Text input
- Length of Service*: Text input

Clicking on the **Save** button at any point will save the questionnaire for later completion.

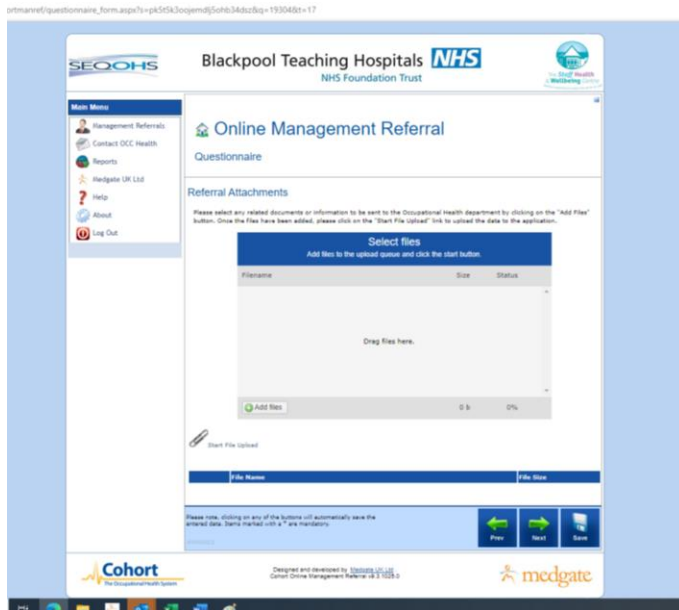
To return to a saved questionnaire from the front screen, select the relevant referral and click **View**.

The screenshot shows the 'Online Management Referrals' dashboard. The dashboard includes a 'Main Menu' on the left with options: Management Referrals, Contact OCC Health, Reports, Helpline UK Ltd, Help, About, and Log Out. The main content area is titled 'Online Management Referrals Dashboard' and includes a search filter section with fields for Surname, First Name, DOB, N.I. Number, Status, and Employer. Below the search filters is a 'Results' section with a table of 'Recent and Current Management Referrals'.

First Name	Surname	Status	Created By
Donald	Duck	Unsaved	ukhsd11

At the bottom of the dashboard, there is a 'Welcome: ukhsd11' message and a navigation bar with buttons for 'Home', 'Add', and 'View'. The 'View' button is circled in red.

There is a screen that allows supplementary documents to be uploaded into the referral, e.g. risk assessments you have undertaken/job descriptions etc.



Select **Next** or **Save** to continue.

You can download a copy of the report by selecting **Report**



Once all the fields have been input and the referral is complete, clicking the **Submit** button will send the referral directly to Occupational Health



N.B. Once the referral has been Submitted, you will not be able to add or change anything within the referral, as it is locked.

The status now displayed on the front screen will change to **Sent to OccHealth**.

If a hard copy is required, the print function is available - in order to provide your employee with a copy you need to press the print function.

Once the referral is triaged by Occupational Health and an appointment is booked, the referring Manager will see the status change on the initial screen to '**Appointment Made**', and the date offered will also appear.

The attendance will also be updated as the process develops (don't forget you can log on at any time to check which stage the referral is up to).

Once the clinician has created the report it will be sent back to the referring Manager and appear on the front screen as '**Response created (and the date)**'. There is an option to print a copy if required.

- **Additional features:-**



On the left hand side under the main menu there is a link to allow you to contact Occupational Health if there are any questions about the referral.



There is also a Help button to offer the user guidance.