



Heales Medical

Managers Portal

Management Referral Case Guide

Leading Innovation in Occupational Health



TABLE OF CONTENTS

- 1. BEFORE YOU BEGIN..... 3**
- 2. LOG IN TO THE PORTAL..... 3**
- 3. CREATING THE REFERRAL..... 5**
 - Entering the Employee Details..... 5
 - Page 1 - Details about the Job..... 8
 - Page 2 - Details about the Referral..... 10
 - Page 3 - Standard Questions..... 10
 - Page 4 - Additional Questions..... 11
 - Page 5 - Confirmation that the Employee is aware of the referral..... 12
- 4. AFTER CASE SUBMISSION..... 13**
- 5. MANAGEMENT ADVICE REPORT..... 14**
- 6. FURTHER HELP..... 14**

1. BEFORE YOU BEGIN

Before you start to make a new Management Referral, please ensure that you have the following information to hand:

- First name
- Other Names/s
- Last name
- Title (Mr, Mrs etc)
- Date of birth
- Job Title
- Personal email
- Personal mobile
- Home telephone (If known)
- Home address (including postcode)

2. LOG IN TO THE PORTAL

Log into the Managers Portal using your User Name, Password, and three letters from your secure word.

Once you have logged into the Manager Portal, there are a number of Help icons on the Welcome & Home Page, as shown below.

Please refer to these for further guidance.

The screenshot shows the 'Welcome' page of the Managers Portal. At the top right, it says 'Sample Company 1'. The navigation bar includes 'Staff Admin', 'Update your details', and 'Logout'. Below the navigation bar, there's a sidebar with 'Home', 'Refer case', 'Case list', and 'Case report'. The main content area has a 'Welcome' heading and several informational sections: 'COVID-19 Long COVID', 'Vaccinations - COVID-19 Vaccination effect', and 'COVID19 Referral'. At the bottom, there's a 'Help' section with three icons: a question mark for context help, a play button for video help, and a book icon for further information.

Welcome page of the Managers Portal

Throughout the process of referring a case, you will see these icons appear. Click on these icons if you require assistance with the current task.

There are 3 icons:



A question mark symbol (?) indicates that there are help notes that can be switched on or off by clicking the icon.



A white triangle within a grey circle indicates that there is a video - each video has sound, so please ensure the volume on your device is switched on.



The grey book indicates that there is further information available about Occupational Health, and how it works.

Once logged into the Managers Portal look to the left of the screen and you will see four options, as shown below:

Select **Refer case** to expand the menu



Once expanded, select **Management Referral**



3. CREATING THE REFERRAL

Entering the Employee Details

Once you have selected Management Referral, you will be asked to enter the First Name, Last Name and DOB of the employee. The employee you are referring may already be on the database.

If the employee is on the database, the system will populate the referral document with their details.

If the employee is not on the database, the system will advise you (as shown below) and give you the opportunity to add them, which you must do to continue with the referral.

If the employee is already on the system, you will be able to edit or add any job or personal details on the next page.

If the employee is not already on the system click the 'Add' button to add them to the system.

Home

Refer case ▲

Pre-employment

Management Referral

Student Referral

Health Surveillance

COVID-19 Vac Confirmation

Needlestick/Sharps Injury

Ill-health Retirement

Musculoskeletal Assessment/Treatment

Counselling

Advice (General, Policies etc.)

Case list

Case report

Refer an employee : Management Referral

You can view more information about Occupational Health by clicking this icon.
Please enter any details to select the employee. If they do not exist you may enter details to add them.

Firstname

Last name

Date of Birth

Next
Add
Cancel

This person does not exist in the division(s) you are in or below, there are however some existing employees with similar details listed below. You may select the person from the list below by clicking on the icon at the right of the row, click 'Add' if you want to add this person to the OH database, change search details and click 'Next' if you wish to check again, or 'Cancel'.

Fred	Smith	1 Jan 1900	Head Teacher	,167277,Department C,Site CA	
John	Doe	8 Aug 1949	Cleaner	,373425,Department C	

Adding employee to the system

Home

Refer case ▲

Pre-employment

Management Referral

Student Referral

Health Surveillance

COVID-19 Vac Confirmation

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Case list

Case report

Refer an employee : Management Referral

Please complete/check these details before submitting

Order Details

? Order/Requisition/Budget number or code

Job details

? *Job Hours per week ? *Job Risks (click 'No job risks' if there are none) ? Requirec

, Food Handler

Please check the "?help icon, do not enter the work address here

? *Div 1 ? Div 2 ? Div 3 ? Div 4

Div 6 Div 7

If this role is for a healthcare worker please ensure that the appropriate job risks are ticked under 'Special Requirements'.

Employee Details

*First name Other names *Lastname

*Title Date of Birth *Gender Male Female Neutral Prefer not

Address 1 Address 2 Address 3

Town County Postcode

Phone number ? Mobile number ? Personal e-mail

Next
Cancel

* Indicates minimum required fields.

If you do not have a mobile number and personal e-mail address for the employee then Occupational Health will require an address to post forms (it is helpful to include this data anyway if possible).

Nb. Under 'Employee Details' please enter the employee personal details, including mobile and e-mail if known, NOT your own.

Adding or editing Employee details.

Job Title

Once you start to type the job title of the employee, a list of job titles will appear, select the relevant role from this list. If the role is not already in the list, continue entering the title and the system will add it to the database.

Hours per Week

Next enter the number of hours the employee works in a normal week.

Job Risks

The system stores a base line of job risks for each job, so some risks will already be ticked. Please check that these are correct and appropriate for the person you are referring. You can add or remove risks but this will only apply to the case which you are referring (it will not amend the base line).

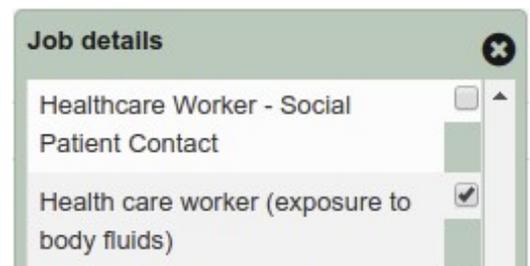
You must complete this section. If there are no associated risks, then please select No Job Risks.

Job Risks are important as they indicate what the employee is exposed to as part of their job role. The associated risks also assist occupational health to advise you on any health surveillance or workplace alterations that may be required.

If the employee is a Health Care worker, there are two options:

Social Patient Contact refers to a job role such as a Medical Receptionist, Dental Assistant etc.

Exposure to body fluids refers to an RGN, Staff-nurse, Dental Hygienist, Home Care etc.



Divisions

The division structures are very important and must be completed. If the divisions are left incomplete, you will not be able to find the record in the future and the system will assume that the person you are creating is in the same division you.

You will see that some divisions have been auto completed for you, the system has entered all divisions above and including you (as the referring manager).

Example

You are a Senior Manager, the employee you are referring is a Team Leader and there is a Line Manager between you both.

The system has completed the divisions above & including you and you fall into Division 4.

This would mean that the Line Manager below you would be entered into Division 5 and the Team Leader (the employee you are referring) would be the final entry in Division 6.

If the employee is in a division below you, you must now enter each division that falls between you and them, the final field should be the employees division.

To select a Division, click the pencil icon.

Employee Details

The next step is to check/enter the Employee Details - Names, Title, full address including Postcode, Telephone number, Home telephone (if applicable) and email.

Notifications

The system will send the employee notifications of appointments, for the system to do this a mobile number and personal email address must be entered into the correct fields, as shown below:

Mobile number	Personal e-mail
<input type="text"/>	<input type="text"/>
<i>Enter employee personal email address and telephone number</i>	

Without both of these, notifications will only be sent via post which will cause delays to the process.

Once all of the above fields have been completed, you can select the NEXT button and you will be taken to a new screen.

Page 1 - Details about the Job

Page 1 will start by asking you to select the reason for referral, along with a main category of referral. For example: Long Term Sickness, due to Infections.

There is then a series of questions, asking you if you have provided relevant information and in what format. For each of these you can 'attach' evidence such

Test2 Test2 (manager portal)

- Home
- Refer case
- Pre-employment
- Management Referral
- Student Referral
- Health Surveillance
- COVID-19 Vac
- Confirmation
- Needlestick/Sharps Injury
- Ill-health Retirement
- Musculoskeletal Assessment/Treatment
- Counselling
- Advice (General, Policies etc.)
- Case list
- Case report

Management Referral Form

Confidential

Miss John Doe, 08/08/1949, Cleaner, (Sample Company 1) Department C.373428,Department C

First Previous 1 of 5 Next Last

Please enter job risks/details for employee, if applicable , Food Handler

Reason for referral

Please enter main category of referral if applicable

Please confirm the following:-

Job description is attached to employee OH record or attached/sent with this referral If sent, please state method

Whether a job risk assessment is attached /sent with this referral If sent, please state method

Whether a H&S risk assessment is attached /sent with this referral If sent, please state method

Any other applicable information attached/sent with this referral If sent, please state method

First Previous 1 of 5 Next Last

Page 1 of the management referral.

as a job description by selecting the 'attach' option from the drop down list and selecting the file from your documents by clicking on 'browse'.

If you are unable to attach the required evidence/information, then you can select 'sent' and provide the method of sending in the second drop down box, for example: via post, email or fax.

You can also choose N/A if the question being asked is not related to the case.

Page 2 - Details about the Referral

Page 2 will start by asking you what capacity the employee is currently at work and then ask a series of questions that can only be answered as yes or no.

- Home
- Refer case
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Test2 Test2 (manager portal)

Management Referral Form

Confidential

Miss John Doe, 05/08/1949, Cleaner, (Sample Company 1) Department C,373428,Department C

First Previous 2 of 5 Next Last

Is the employee At work full At work limited At work re-deployed Off work

Is there any indication that the reason for absence is work related? Yes No Unknown

Are you aware of any medical conditions the employee has which may affect or be affected by work? Yes No Unknown

Are you aware of any problems or concerns in the individuals home or personal life which may be relevant? Yes No Unknown

Are you aware if the employee has or is undergoing any treatment in connection with their medical condition? Yes No Unknown

Have any actions in relation to adjustments in the work place already been considered/taken in this case? Yes No Unknown

Has re-deployment been considered in this case? Yes No Unknown

Is there any further information you would like to add? Yes No Unknown

First Previous 2 of 5 Next Last

Page 2

Page 3 - Standard Questions

Page 3 provides 10 pre-set, frequently asked questions, that will be answered in the report or taken through the case until answered. Some questions may require additional information, such as a GP/Consultant report or a review appointment, if agreed with the organisation.

You may indicate which particular questions you require answers to below or add further questions on page 4.

A first appointment for an OH practitioner is 45-60 minutes and a review appointment is 30 minutes. An OH practitioner will generally answer up to 8 questions in an hour appointment. Additional questions may require additional time to respond to. Appointment times are allocated in 15 minute blocks.

What is the employee's current state of health and how does that affect the employee's attendance or performance?	<input type="checkbox"/>
In your opinion is the illness/injury caused by work or exacerbated by work?	<input type="checkbox"/>
Is the employee currently fit for work? If not when will they be able to consider a return to work?	<input type="checkbox"/>
Are there any further treatments that should be considered?	<input type="checkbox"/>
Are there any adjustments or restrictions on their hours or duties which should be considered on their return to work? If so are they on a short-term (1-4 weeks), medium term (1-3 months), long-term (> 3 months) or permanent basis?	<input type="checkbox"/>
Will the employee be able to provide reliable and consistent attendance from now on?	<input type="checkbox"/>
Is the employee's medical condition likely to fulfil the criteria for disability under the Equality Act 2010?	<input type="checkbox"/>
Should alternative employment or ill-health retirement be considered at this point?	<input type="checkbox"/>
Is the employee fit to attend a disciplinary hearing?	<input type="checkbox"/>
Is the employee fit to attend a meeting with their line manager and/or HR?	<input type="checkbox"/>

3 of 5

Page 3

Only select those which are relevant to your referral and that you wish for your employee to be asked during their appointment.

Page 4 - Additional Questions

Page 4 allows you to add in any additional questions that you have for OH. Only one question can be put into each text box.

Additional questions may require additional time to respond to. Appointment times are allocated in 15 minute blocks.

Additional questions (one question per row)

Page 4

If you wish to enter more than one question, use the symbol to create another text box.

If at any point you wish to delete a text box, use the icon to remove.

Top Tip

We can answer up to 8 questions in a 45 minute appointment, over 8 questions will require an extended appointment. If you select more than 8 questions a pop up warning will appear. Complex cases and Psychological cases will require an appointment that is 60 minutes or over.

Page 5 - Confirmation that the Employee is aware of the referral

Page 5 asks three questions that need to be answered to comply with legislation and ethical practices.

In order to comply with legislation and ethical principles it is a requirement that the employee is informed when they are referred to Occupational Health and the reasons for that referral. Please confirm the following as appropriate:-

The employee has been made aware of the referral, the reasons for the referral and that an appointment has/may be arranged for them to visit Occupational Health. Yes No

The employee has been informed that Occupational Health may contact them by telephone, e-mail or letter either at work or at home depending on information available. Yes No

The employee will be provided with a copy of this referral form. Yes No

[Submit Referral](#)

⏪ First
⏪ Previous
5 of 5
Next ⏩
Last ⏩

Page 5

It is best practice that the responses to all of the above three questions is answered as Yes, although the final decision does lie with the referrer.

Please be aware

If the employee is not made aware of the referral to Occupational Health (question one), the appointment may be cancelled or terminated, however, the charge will still apply.

Once you are happy that you have completed all pages 1 to 5, as thoroughly and accurately as possible, you can submit the referral by clicking on the button:

[Submit Referral](#)

4. AFTER CASE SUBMISSION

Once you have submitted the referral you will be given a Case ID that is 6 digits, for example: 311899. Please record the case ID as this will be required should you need to contact a member of the Heales Medical Team to discuss the case.

If you have provided us with an email address for the employee you have referred, they will receive a courtesy email advising them of the referral and that Heales Medical will contact them in the near future.

You will also be able to see the case within the **Case List** section.



All of the cases you submit will be listed in this section with the current status of each case.

Key : Closed case Open case Draft case (not submitted to Occupational Health)

Case Status Key

If the case you have just submitted is showing as a Draft case, you will need to go back into this case, ensure that all relevant fields have been completed and re-submit the case.

If you are struggling to do this or experience any other problems you can contact your HR or contact Heales Medical directly.

Heales Medical
0333 344 9089

5. MANAGEMENT ADVICE REPORT

Once the employee has attended their appointment, a Management Advice Report will be produced. If the employee has asked to view the report prior to it being sent to their referring Manager, they will be sent the report and given 3 days to respond. If we do not hear from the employee within these 3 days, the report will automatically be sent to you to view.

You will receive an email to let you know that the report has been completed and is ready for you to view, within this email there will be instructions on how to view the report.

The report will only be available to view for 15 days. If for any reason you have not viewed the report within this time, you will need to contact Heales directly to ask for a copy to be sent.

It is recommended that you download/extract the report when you first view it, for your future reference & records.

6. FURTHER HELP

For advice on Pre-employment cases, please refer to the guide **How to Create a Pre-Employment Case**.