Portal Users - Creating a Management Referral

Please note that once you have logged into the Manager Portal, there are a number of Help icons on the Home Page. Please refer to these for further guidance. The icons are located at the top right of the screen.

A right pointing triangle in a grey circle, indicates that there is a video that you can watch to assist you. The video has sound, so you will need to make sure that your volume is turned up.

? in a grey circle indicates that there are help notes that can be switch on or off by clicking the ? Icon

Once logged into the Managers Portal look to the left of the screen and you will see the following options:

Select Refer cases and a drop down will appear: Select Management Referral
Before you start to make a new Management Referral, please ensure 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)

Select Management Referral. The screen will change and you will be presented with a new screen – Refer an employee: Management referral
The employee you are referring may already be on the database. Type in their first name, last name and date of birth nn/nn/nnnn

If the person 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 such and give you the opportunity to add them, which you must do to continue with the referral.

Start to type the job title, the system will give you options of job titles that meet what you have typed. If the job title is there, then select it. If the job is not in the list, continue entering the job and the system will add the job title to the database.

Enter the number of hours the employee will work in a normal week.

In the Job Risks field, you may already see associated risks, please check that these are correct and appropriate for the person you are referring. If not you can click the pencil Icon and add in the risks, or amend those that are already there, by removing the tick or by adding additional risks. This will not update the base data, but will only update the risks for your particular candidate. 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 advice you on any health surveillance or vaccinations that are required at the time of employment.
With regards to the Job Riks of Health Care worker. Please ensure you click this field if the candidate is in fact a health care worker. There are two healthcare worker option, Social Patient Contact, refers to for example: Receptionist, Dental Assistant. Health care worker (exposure to body fluids would refer to for example, RGN, Staff-nurse, Dental Hygienist, Home Care

<table>
<thead>
<tr>
<th>Healthcare Worker - Social Patient Contact</th>
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<tbody>
<tr>
<td>Health care worker (exposure to body fluids)</td>
</tr>
<tr>
<td>Please do not click this job risk otherwise.</td>
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Check/Enter the first name, other name and last name.

Check/Enter the Title by clicking the drop down and select as appropriate

Check/Enter the date of birth, this can be type directly into the field, the format is xx/xx/xxxx or alternatively you can use the calendar icon.

Check/Enter the Gender.

The Division structure are very important and you must complete them all. The system will assume that the person your are creating is in the same division as you and these divisions will be auto populated. If they are in a division below you, please ensure your complete each field, until the candidates final reporting division has been entered. You may or may not need to complete all of the divisions levels to achieve this. To select a Division, click the pencil icon

Check/Enter the full address, including Postcode.

Phone number. If you have the employee home phone number please enter it.

For notification to the employee to work as intended, your candidate must have a personal mobile and personal email and you must enter these in to the correct fields, before you submit the case. Please ensure you enter the personal mobile into the Mobile number field. The reason for this is that the system looks at the Mobile number field when it sends text messages to the candidate/employee. If the mobile is in the wrong field, the system will assume you have not provided the mobile and the Management Referral case will revert to Post.

Please enter the Personal e-mail for your candidate. If the personal email is not entered, the case will revert to Post.

Once all of the above field have been completed, then you can select the Submit button.
The screen will change and you will be directed to Page 1 or 5. You must respond to each line in turn. Information can be attached as you would to an email. The section regarding any other information, such as the sickness absence record.

Once Page 1 or 5 is complete, go page 2 of 5. Answer each question in turn. The more information you provide, the more robust our advice will be. If you answer Yes to any of the points, the system will present a text box, where you must give further details to support your Yes selection.

Once Page 2 of 5 is complete, click next for Page 3.
Page 3 provides 10 pre-set frequently asked questions. Only select those which are relevant to your referral. There are a finite number of questions that can be responded to in a standard 45 minute appointment, do not waste that time. If the questions on Page 3 do not cover what you wish to ask, you can add additional questions of Page 4.

To select the question, click the radio button to the right of the question line.

Once page 3 of 5 is complete, click next for Page 4 where you can add any additional questions.

It is important that you only add one question into each line, as the questions are imported from the Referral into the <Management Advice report, for the clinician to respond to. If further questions are required, click the + for a new question line.

Any manually added question are counted with those selected on page 3, if you exceed 8 questions, further time, in increments of 15 minutes will be added to the appointment slot.

When/If you have added any further questions on page 4 then click next for page 5, which is the final page.
Page 5 has three questions that are asked to comply with legislation and ethical principals

1) The employee must be aware of their referral to occupational health, the employee must know why they are being referred and that an appointment will be arranged for them.

2) The employee must be informed that occupational health will contact them, either by telephone, email and text or by letter.

3) The referrer must confirm if the employee will be provided with a copy of the referral form.

It is best practice that the responses to the questions on Page 5 are all Yes, although the final decision lies with the referrer. If the employee is not made aware of the referral to occupational health, the appointment may be cancelled or terminated, and a charge will still apply.

You can go back and forth between the pages, but once you are satisfied, then click the Submit Referral button at the bottom left of page 5.

You will receive an email into your work email account, that will advise you that the referral has been received and the unique case number.

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

This concludes the process for raising a Management Referral via the portal.