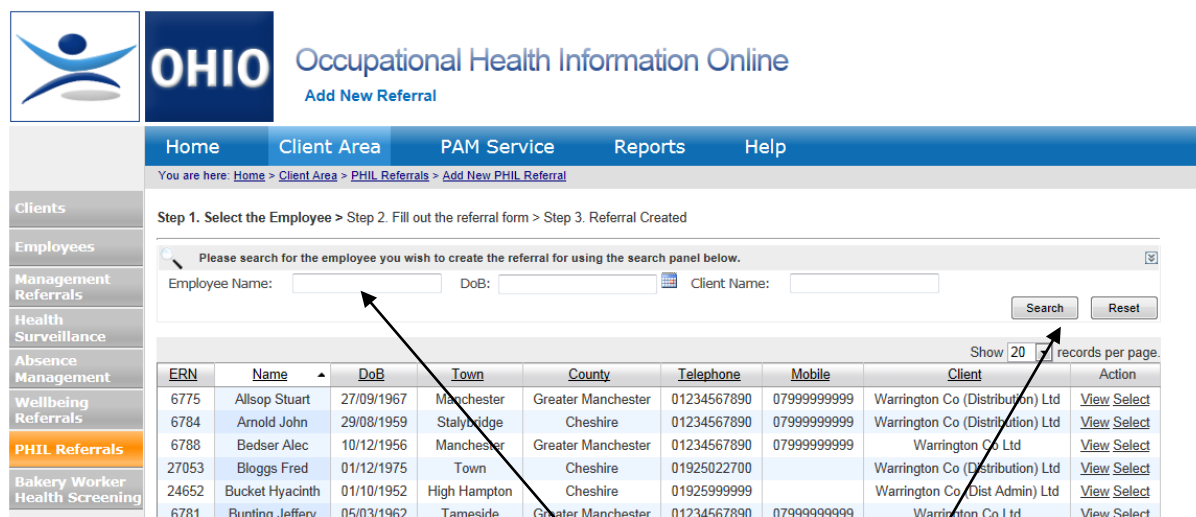


## How to Create a Management Referral

A Management Referral is made when a Manager wishes to refer an employee to People Asset Management (PAM) due to Long Term Sickness Absence, Short Term Sickness Absence, or Review of an employee at work but not doing the job they are employed to do because of a health reason, or a Review as part of a continuing assessment plan.

The aim is to provide advice regarding the likely duration of sickness absence; the functional effects of any ill health on the employee's work, how their health affects their ability to work, and suggested rehabilitation approaches back into the workplace where appropriate.

To create a referral select NEW Management Referral from the Home Page



Search for the employee by typing their surname and press Search

Click the "Select" link in the "Action" column of the required employee

You are presented with the details of the selected employee.

Press "Continue" if the displayed employee record is correct.



Fill out the online referral form:

The screenshot shows the 'Referral Form - Aillsop Stuart' interface. It is divided into three main sections: Personal Details, Contact Details, and Employment Details. The Personal Details section includes fields for DOB (27/09/1967), address (16 Grange Avenue Levenshulme, Manchester Greater Manchester M19 2FY), telephone (01234567890 / 07999999999), and email (hr@ohiosystems.co.uk). The Employment Details section includes Client (Warrington Co (Distribution) Ltd), Department (Warehouse), and Job Title (Operative). A 'Referring Manager' section on the right allows selection between Albert Trotter and Pamela Ewing (checked). A confirmation question 'Are the employees personal details correct?' has 'Yes' selected. Below this is a 'Referral Details Step 2.1 About The Employee >' section with questions: 'Has employee been advised a referral is being arranged?' (Yes selected), 'Is the employee a shift worker?' (Yes selected), 'First Date of illness' (calendar icon), and 'First Date of absence' (calendar icon with a red asterisk). Callout boxes provide instructions: 'Confirm the referring manager' points to the manager selection; 'You have the ability to correct employees' records' points to the 'Amend' button; 'Provide details about the employee's absence details' points to the absence date fields; and 'You must advise the employee a referral has been arranged and click "yes"' points to the 'Yes' selection for the first question.

On this page

- you have the ability to confirm the employee's details are correct
- make amendments if necessary
- confirm who is the manager making the referral

### Step 2.1 About the Employee

- Confirm the employee has been advised about the referral, there is an explanatory document that you can give them
- Give details of whether the employee is a shift worker, in work, not in work or whether any adjustments can be made to accommodate them
- Indicate the first date of illness and first date of absence.

Click "Continue" when all sections are completed.

Tip : Fields marked with \* are mandatory





## Step 2.2 About the Referral



At each Step there is a Handy Tips icon to help you.

### Referral Details Step 2.2 About The Referral

#### Reason for Referral:

- Short Term Absence
- Long Term Absence
- Bakery Worker Health Screening
- Presenteeism
- Follow up review
- Other
- Frequent or sporadic sickness please provide details below
  - 21 days absence - longer than or likely to be longer than
  - Bakery worker health screening
  - In work not on full duties
  - Employee needs a further consultation
  - Other management concerns about employee

Indicate the main reason why you are referring them adding any additional comments in the box below.

#### Employees Reason for Absence:

Manager add comments

complaints of sickness

Please select service required. This will normally be a management referral; the OH team will triage this

#### Initial Referral:

Please select

#### Service Required:

Management Referral (OHA1)

We actively encourage you to discuss referrals with our clinicians.

Do you require a pre consultation briefing with our clinician? \*Yes  No

Do you require a post consultation briefing with our clinician? \*Yes  No  Managers contact number: \*078385948

Tell us the best phone number to contact you on

## Step 2.3 About the Referral





OHIO

# User Guide

## Referral Details Step 2.3 Management Information >

### Employees Absence History:

has been off sick for 2 days

Help us to provide answers to your questions regarding the referral. If you have questions other than those below please enter them in the box above.

### Advice Required from Occupational Health:

- What is the employees current fitness for work?
- Likely date of return to work?
- What effect will this condition have on the employees ability to carry out his/her duties?
- \*  Are there any modifications / adjustments which would alleviate the condition or aid rehabilitation?
- Are there any particular duties the employee cannot do?
- What duties can the employee perform?
- Is the condition likely to re-occur in the future?

### Please provide any supporting documents that are relevant to the referral:

[Purchase Order I](#)

Your cost centre must be entered as the Customer Order Reference

The referral is now complete, you must press submit.



OHIO

Occupational Health Information Online

[Add New Referral](#)

[Home](#) [Client Area](#) [PAM Service](#) [Reports](#) [Help](#)

You are here: [Home](#) > [Client Area](#) > [Management Referrals](#) > [Add New Referral](#)

Clients

Employees

Management Referrals

Health Surveillance

Absence Management

Wellbeing Referrals

PHIL Referrals

Bakery Worker Health Screening

The referral for Stuart Allsop has been logged and PAM Client Services have been notified. A confirmation email will be sent to your email address with details of the referral. The Referral ID for this referral is **23532**, please use it for further reference.

You will also receive an e-mail confirming your referral has been submitted.





**OHIO**

## **User Guide**

From here you can either: book an appointment, create another referral or go to the referral list

**NB** you will receive an e-mail confirming the date, time and venue for the OH appointment. You must make the staff member aware of this. If they are unable to attend the e-mail should explain how they can go about arranging an alternative appointment

The OH report that follows from the appointment will also only be sent to you (the Manager) and you should forward this on to your staff member and arrange a meeting to discuss this, sometimes a letter may need to be sent with this. If you have any questions about the report please contact Occupational Health

