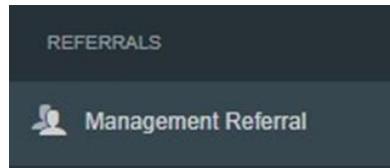


OPAS-G2

**Referring Managers
Guide
V1**

Creating a Referral

From the referrals menu on the left – hand side select '**Management Referral**'



Select '**Create**' from the top right-hand side



Complete all of the '**Referral Details**' seen below

The first section will ask about the referrer. Please note the information will be automatically filled out with the login being used.

Mandatory questions are signified with a red Asterix *

Details of the Referrer & Additional Contributors (0)

Details of the Referrer

Current information held about the Referrer associated with this record

Full Name	Employment Details
Bob Smith (CS86320)	Line Manager
Email Address	Telephone Number
g2.referrer@gmail.com	01312 117758

As this is yourself, if any of the details are incorrect, you can update them here [Update](#)

Additional Contributors can be added if needed, they will need be able to see the final OH advice.

Additional Contributors

Adding personnel as additional contributors will grant them rights to edit this referral record as though they were the referrer. They will also be able to receive any specific communications that have been configured.

i Only personnel records with valid Manager or HR user accounts can be added
The details shown in the grid will be visible to all users granted access this record.

Enter the Name or Date of Birth of a person you wish to add as an additional contributor.. [Add](#)

Name (Reference)	Employment Details	Email Address	Telephone Number
No additional contributors have been specified for this referral			

Next, the employee's details need to be added to the referral, along with the reason for referral.

Referral Details PENDING 

Employee Details

Please enter the details of the employee you wish to refer *

Given Name *	Family Name *
<input type="text"/>	<input type="text"/>
Date Of Birth	National Insurance Number
<input type="text" value="DD/MM/YYYY"/>	<input type="text"/>
Job Title *	Employment Location *
<input type="text"/>	<input type="text"/>
Email Address *	Telephone Number
<input type="text"/>	<input type="text"/>

Home Address

Reason for Referral

Please select the referral type *

Scroll down and complete all sections relevant to the referral, Working Environment, Absence details and Job Role and Specifications.

Finally complete the '**Advice required from Occupational Health**', attach any required documents and complete the declarations.

Advice required from Occupational Health

Please select the questions from the list below which you wish the OH department to answer in regards to this referral.

Is the employee medically fit for their current role?

Yes No

Would any adjustments and/or restrictions to the employee's working environment be appropriate to improve their ability to fulfil their current role?

Yes No

What are the expected timescales for the employee regaining fitness for work?

Yes No

Does the employee have any long term underlying health condition(s) which affect their fitness for work?

Yes No

Does the Equality Act 2010 (previously the Disability Discrimination Act) apply to this employee?

Yes No

If the employee is not fit to return to work, is ill health retirement a suitable option to consider?

Yes No

If there is a specific question that you wish to ask Occupational Health please add it here.

[Add Additional Question](#)

The user does not have to select all the questions but just select yes to those which require an answer to.

Additional questions can also be submitted using the 'Add Additional Questions' button.

Next the manager must confirm that they have or don't have the employee consent. **(Before referring you must gain consent)**

Do you have the employees consent for Occupational Health to contact them regarding this referral? *

Once all section are complete select 'Submit & Request Consent' from the top right **(You can save the referral at any point using the save icon here. However Occupational Health will not have sight of the referral until you submit it.)**



A notification will show an email has been sent to the employee to gain consent.

Management Referral Saved ✓
Continue



Management Referral Saved

The following actions and communications also occurred:

✉ Management Referral - Pre-Consent Requested was sent to g2test2@hotmail.com ✓

In the Management Referral Dashboard, the referral will now be masked as **'Awaiting Pre-Consent'**

Awaiting Pre-Consent		These are referrals awaiting the employee's pre-consent		
Requested Consent	Employee Name	Referrer Name	Referral Type	Actions
28/01/2022 01:52 PM	Bob Smith	Leah Birchall	Frequent Short Term Sickness Absence	<input type="button" value="Open"/>

The employee will now receive an email asking for their consent

Management Referral Dashboard

Management Referral Dashboard Create

Filters

4 Recently Finished 0 Pending 0 Requires Further Information 0 Awaiting OH Triage 6 In Progress 0 Awaiting Consent 0 Awaiting Pre-Consen 0 Employee Pre-Contested 0 Archived

Recently Finished These records have recently been finished by the OH team and are ready for you to review

Completed	Status	Employee Name	Referral Type	Actions
25/07/2021 <small>197 days 12 hours ago</small>	Complete	Jayce Noric	Long Term Sickness Absence	Open
23/09/2021 <small>168 days 23 hours ago</small>	Complete	Virgil Rayben	Frequent Short Term Sickness Absence	Open
29/11/2021 <small>71 days 2 hours ago</small>	Complete	Danica Longstone	Returning To Work	Open
16/12/2021 <small>53 days 11 hours ago</small>	Complete	Linda Brem	Long Term Sickness Absence	Open

In Progress These records are currently being processed by the OH team

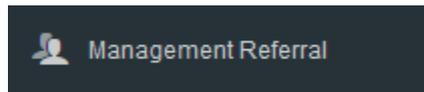
Accepted by OH	Employee Name	Current State	Referral Type	Actions
21/12/2021 <small>49 days 8 hours ago</small>	Alexia Rosselerin	Ongoing	Work Related Ill Health	Open
22/12/2021 <small>47 days 11 hours ago</small>	Norbert Redmore	Awaiting Initial Consultation	Long Term Sickness Absence	Open
03/01/2022 <small>35 days 15 hours ago</small>	Josiah Springham	Ongoing	Frequent Short Term Sickness Absence	Open
10/01/2022 <small>26 days 12 hours ago</small>	Wm Bolgard	Awaiting Initial Consultation	Fitness For Work	Open

As the referral is progressed by the Occupational Health team the status of the referral will be update in real time. **(You will not be able to see any clinical information, but you will be able to see a timeline of events.)**

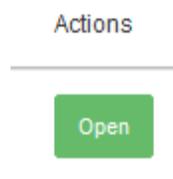
Receiving a response from the Occupational Health Team

When a response/report is ready you will be notified by email. This will confirm the name of the employee and that a report is ready. No further information will be shared.

Click on **'Management Referrals'** on the left hand side



From the dashboard select to **'Open'** the corresponding referral. This will be under the **'Recently Completed'** tab.



The timeline will show the referral is completed.

Additional Information i

☰ Referral Activity 📄 Documents (0) 📧 Communications

Send Message

Sun 18th Jul 2021 16:23	Employee gave consent for their manager to see the OH advice Brendon Winneconnett (CS105132)
Fri 16th Jul 2021 04:27	Employee consent requested Rebecca Hyden (CS10026)
Wed 7th Jul 2021 03:07	Employee Details Validated Rebecca Hyden (CS10026)
Mon 5th Jul 2021 23:58	Submitted To OH Maximiliano Sandhurst (CS105743)

The main body of the page will display the original referral and an Occupational health advice section.

This is the feedback from the Occupational Health Team to you as the manager or referrer.

The Occupational Health Team will have answered the question you requested, providing any further relevant information.

OH Advice COMPLETE

Is the employee medically fit for their current role?

The employee is fit to continue with their normal duties

Please provide any other recommendations and/or advice regarding this referral which has not been covered elsewhere?

And detailed any adjustments required

Referral Outcome

Outcome

Fit

Details of any required Adjustments and/or Restrictions

Adjustment / Restriction	Details
No adjustments or restrictions entered	

Interim Updates

If the Occupational Health Team wish to carry out further appointments regarding a referral they can provide an interim update. **(The same process as above will apply.)**

An email will be received confirming a response has been provided.

Dear Mr Smith,

The Management Referral record for Heath Woodson has an interim update.

Please login to the system to view the Management Referral record and see the interim update provided by the OH department.

If you have any queries please contact us.

Yours sincerely,

Occupational Health Department

Log in and open the record as details above, under the **‘In Progress’** section of the **Management Referral Dashboard**.

In Progress 10				
These records are currently being processed by the OH team				
Accepted by OH	Employee Name	Current State	Referral Type	Actions
03/02/2022 4 days 21 hours ago	Bob Richardson	Awaiting Initial Consultation	Returning To Work	Open
08/02/2022 0 days 0 hours ago	Samantha Sandwel	Awaiting Initial Consultation	Returning To Work	Open
08/02/2022 0 days 0 hours ago	Heath Woodson	Ongoing with Interim Update 	Fitness For Work	Open

The interim updates will have the current state of **‘Ongoing with Interim Update’** and will have a flag next to it.

Click **‘Open’**

This provides the same information as the Occupational Health Advice detailed above but as an Interim report. The referral is ongoing and the Occupational Health Team may yet have further consultations or action with the employee.