# Occupational Health Service

Guidance on making referrals using OHIO

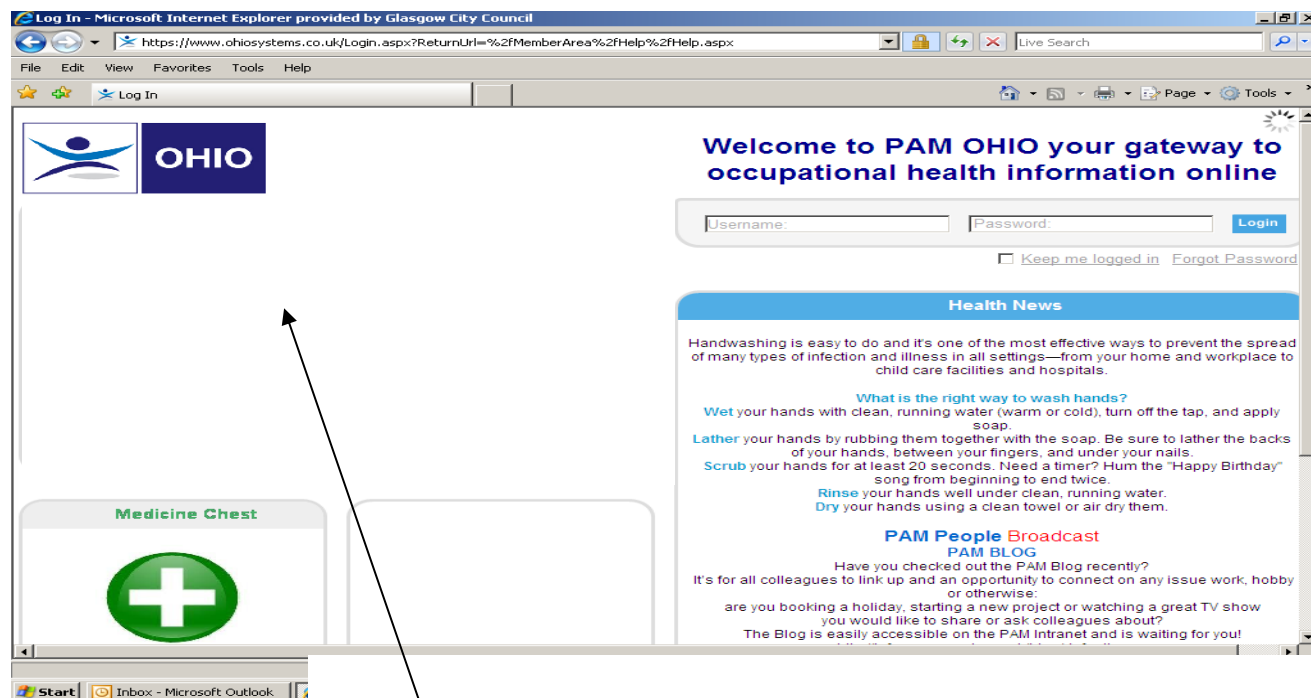# Occupational Health Service
## Guidance on making referrals using OHIO

## CONTENTS

### Access OHIO

Click on the following web link: **www.ohiosystems.co.uk**, which will take you to the OHIO landing page below:



**Tip:   Add a shortcut to your desktop:**

o   Right click on any white area of the OHIO homepage.

o   From the menu options, select 'Create Shortcut'.
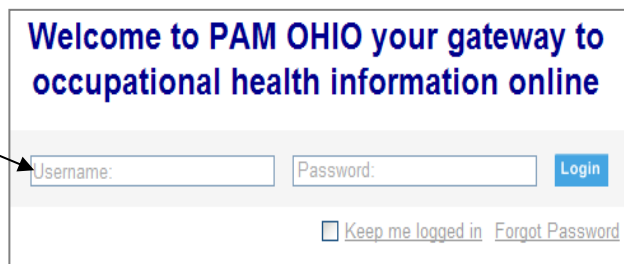
o   Select 'Yes' when prompted.

The PAM OHIO icon will appear on your desktop giving you quick click access to the OHIO landing page.

### Login as a new user

You will have received an automatically generated temporary password by e-mail which will let you login to the OHIO system as follows:

- o Enter your Username and Password in the login box at the top right hand side of the landing page screen.
- o Your Username is your full GCC e-mail address and must be entered in **lower case letters only**.
- o Passwords are case sensitive so take care to enter it exactly as shown in your e-mail.
- o Once you have entered your Username and Password, click on the 'Login' tab.

**Welcome to PAM OHIO your gateway to occupational health information online**

Username:　　Password:　　Login

☐ Keep me logged in  Forgot Password

### Changing your password

Once you have logged in using the temporary password, you will be prompted you change your password to a permanent one of your own choosing.
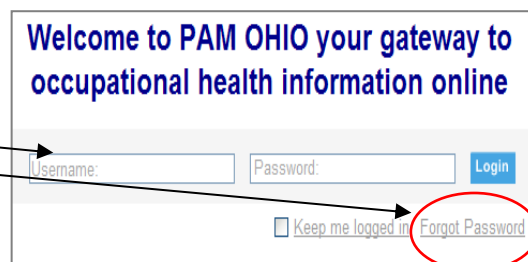
- o Your password must be a minimum of 7 characters and contain at least one capital letter and one number.
- o Ensure that it is something familiar and unique only to you, and something that you aren't likely to forget.
- o Remember that passwords are case sensitive, so make sure that you enter it exactly each time.

e.g.　Smith1997

### If you forget your password

If you forget your password, you can get the system to provide you with a new temporary one to enable you to login.

- o Type your e-mail address in the 'Username' field in the login box.
- o Select 'Forgot Password'.
- o A new temporary password will be generated by OHIO and sent to you by e-mail.
- o You should use the temporary password to login, then change it to your own as above.

**Welcome to PAM OHIO your gateway to occupational health information online**

Username:　　Password:　　Login

☐ Keep me logged in  Forgot Password

If you have any other problems logging in, please contact the **OHIO Support Line: 0845 6435331**
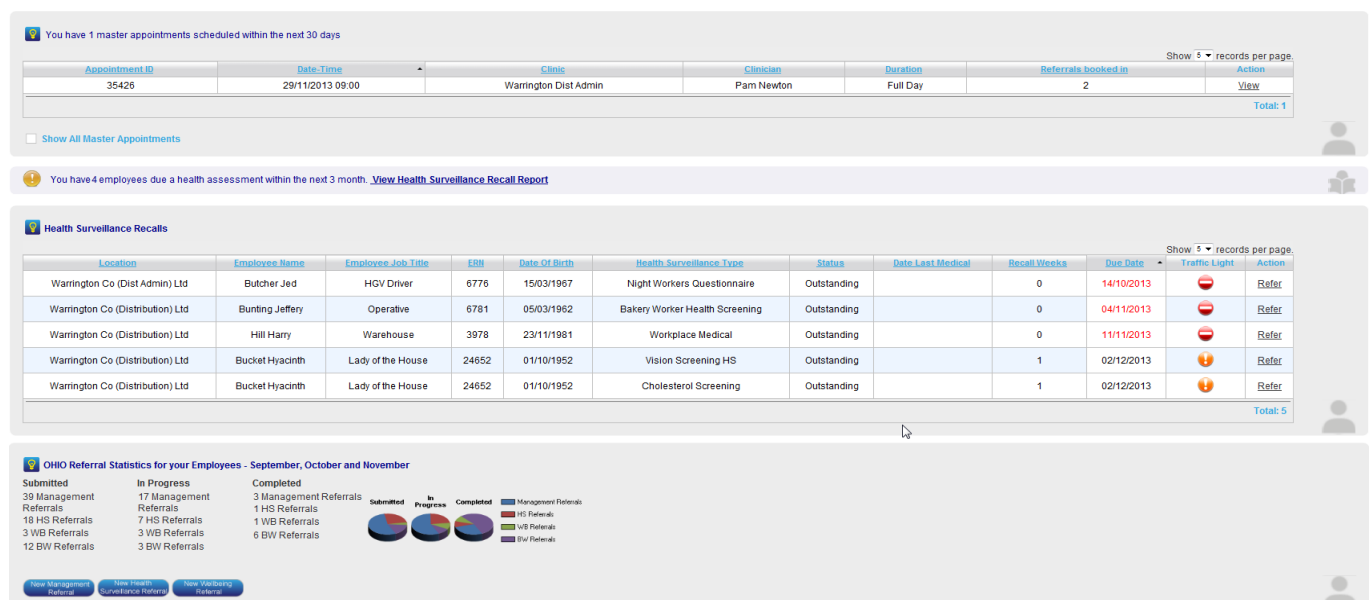
### OHIO Home Page

Once you have logged into the system you will be directed to your own Home Page:



o   The blue bar at the top of the page shows the main areas of the website.

o   There are additional drop down menus with links to the key functions.

The manager's 'dashboard' is situated directly below the menu bar. It provides an overview of information and alerts that enable you to keep track of what's happening with referrals you have made and employee health surveillance requirements if applicable.

### Create an employee record

If it's the first time the employee has been referred to Occupational Health using OHIO, they won't have a personal record on the system so you will have to create one for them. You can do this by following the steps below:

- o Hover your mouse over the 'Client Area' tab to reveal the drop down menu.
- o Hover over 'Employees'
- o Click on 'Add New Employee'.

The 'Add New Employee' page will appear:

You must provide the following:

- · **Person ID** (employee SAP number)
- · **Title**
- · **Gender**
- · **Forename, Surname**
- · **DoB**
- · **Address 1**
- · **Postcode**
- · **Telephone**
- · **Mobile**
- · **Reminder method**
- · **Client** (select from the dropdown list)
- · **Job Title**

This is the number the employee will be contacted on.

Do not complete any other field

You will already have met with the employee to confirm the details, and have the information recorded on the Employee Information Pro forma. PAM will be unable to proceed with the referral until the employee's full postal address and telephone numbers are provided.

- o Check that you have provided all the information required.
- o Scroll along to the far right of the screen and click on 'Save'.
- o The employee has been added to the system and you can now make a referral for them.
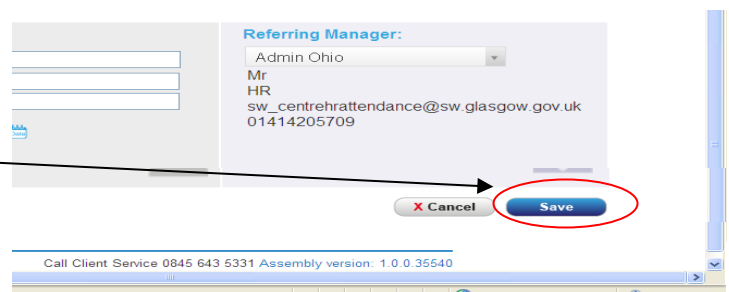
The employee record has been created.
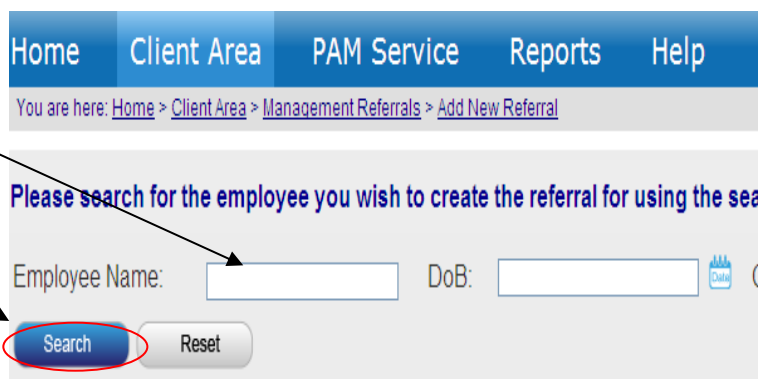
**Access the record of the employee you are referring**

| Client Area | PAM Service | Reports |
| --- | --- | --- |

Clients

Employees

**Management Referrals**   Add New Referral

Health Surveillance

- o   Go to your Home Page.
- o   Hover your mouse over the 'Client Area' tab to reveal the drop down menu.
- o   Hover your mouse over 'Management Referrals'.
- o   Click on 'Add New Referral'.
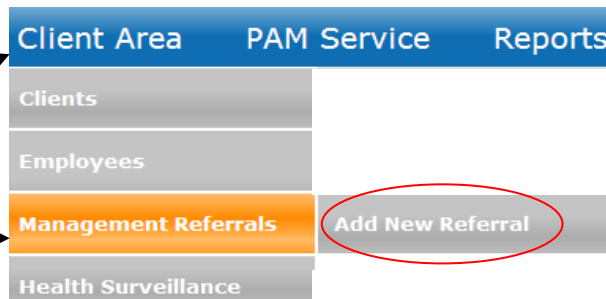
| Home | Client Area | PAM Service | Reports | Help |
| --- | --- | --- | --- | --- |

You are here: Home > Client Area > Management Referrals > Add New Referral

Please search for the employee you wish to create the referral for using the sea

Employee Name: [                    ]   DoB: [                    ]

Search     Reset

- o   Type the employee's Surname
- o   Click on the 'Search' tab

| ERN | Name | ▲ | DoB | Client |
| --- | --- | --- | --- | --- |
| 326234 | Admin Ohio | | | Glasgow CC Social Work |

Show 20 ⌄ records per page.

| Mobile | Action |
| --- | --- |
| 07777777777 | View Select |

- o   A link to the employee's record will appear as shown.
- o   Check the full name and date of birth to ensure that you have the correct person's record.
- o   Scroll to the 'Action' column on the far right of the row and click on 'Select'.

**Complete the online referral form**

Once you have added the employee to OHIO or selected an employee's record, the first part of the online referral form will appear on the screen. This is where you will provide information about the employee who is being referred.

You will already have this information captured on the Employee Information Pro forma completed at your meeting with the employee.



**Referral Form**

Personal Details    Contact Details                    Employment Details

Employee name, address

**Tel:** 01414205709 / 07777777777
**Email:** employee@gasgow.gov.uk

Are the employees personal details correct?    Yes ☑ No ☐    Amend

Client:
Department:
Job Title:

Click 'Yes' to confirm that you have verified the details with the employee at your meeting with them.

**Referral Details** Step 2.1 About The Employee >

Click on light bulb icon for helpful tips

Has employee been advised a referral is being arranged?    ☑ Yes  ☐ No

You must click 'Yes' to confirm that you have met with the employee and have advised them that a referral will be arranged.

Is the employee a shift worker?    ☐ Yes  ☑ No    First Date of illness: * 03/05/2014

Is the employee in work currently?    ☐ Yes  ☑ No    First Date of absence: * 05/05/2014

If the employee is not currently in work you will need to provide the dates in the above fields.

Can short term work place adjustments be made?    ☑ Yes  ☐ No

X Cancel    < Back    Continue >

This should be marked 'yes'

Check that you have provided all the required information and click on 'Continue'

The second part of the online referral form will appear on the screen. This is where you provide information on the referral.

## Referral Details Step 2.2 About The Referral >

**Reason for Referral:**

Select the appropriate checkbox to indicate the reason for referral.

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

Please provide information relevant to the referral:

- e.g. the reason for absence, if applicable;
- the condition/issue you're seeking advice on;
- supports explored;
- any further questions not included above.

***Important: Please also indicate:**
- any dates/times when the employee may be unavailable; and
- the date of a disciplinary hearing (if applicable) so that PAM can try to ensure that an appointment is conducted and a report is available prior to that date.

**Employees Reason for Absence:**
Manager add comments

**Initial Referral:** Please select ▾ — Ignore

**Service Required:** Please select — Select 'Management Referral'

💡 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.

It may be helpful to discuss the case with the clinician before and/or after the consultation.

If you want the clinician to contact you, click the 'Yes' box.

*** Remember to provide your contact telephone number.

The third part of the online referral form is where you provide any management information relating to the case:

**Referral Details** Step 2.3 Management Information >

**Employees Absence History:**

> Provide previous absence history you think is relevant to the referral.

**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?

> Tick appropriate boxes to indicate the advice you require.

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

[ Choose File ] [ Upload ]    **Customer Order Ref:** [          ]

[ X Cancel ] [ < Back ] [ Submit > ]

> Ignore

> Once you have chosen the file, click on 'Upload'
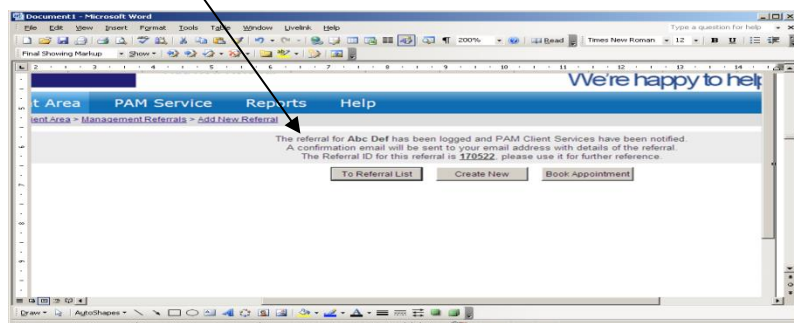
> Click 'Choose File' tab to attach any relevant supporting documents. For example, this may be a letter issued to the employee outlining support offered, or a job description.

> Select 'Submit'. The following message will pop up to confirm that the referral has been submitted.

We're happy to help

The referral for **Abc Def** 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 **170522**, please use it for further reference.

[ To Referral List ] [ Create New ] [ Book Appointment ]

### Create an employee record

If it is the first time the employee has been referred to Occupational Health using OHIO, then you will have to create a record for them as described above in Section 2 Making a management referral – Create an employee record.

### Access the record of the employee you are referring

If you are searching for an employee who you know has an existing record on OHIO, then you should select "Client Area" and "Employees" tick the check digit "See All" and type in employee's name.



Select "View", the display will only show the employee basic details, not giving access to Consultation Reports tab. To change this, scroll to the bottom of the employee screen and see "Authorised Managers" and "Referring Managers". Your name should appear in the left hand box.
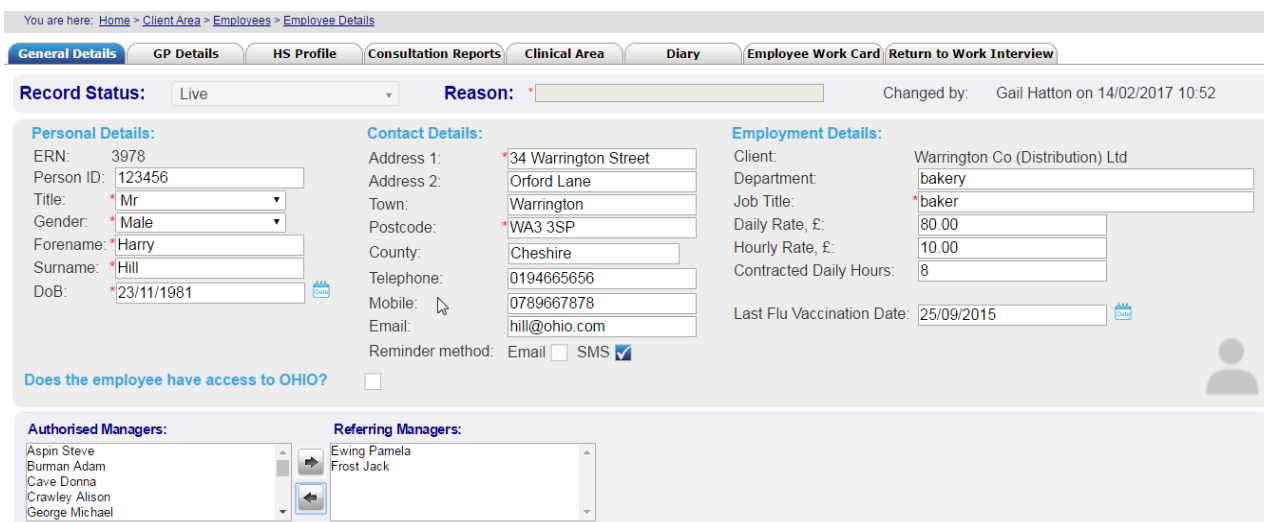
Click on your name and click the transfer arrow to move it to the right hand box.

Now press and you will become a Referring Manager and be given full access to the employee file.

Select the 'Work station Assessment' option from the list by clicking in the tick box.



On the following screen, you should then click 'refer':



## Complete the online referral form

This will take you to the Health Surveillance referral page where you will complete the referral form as normal. See Section 2 Making a management referral – Complete the online referral form.

### Create an employee record
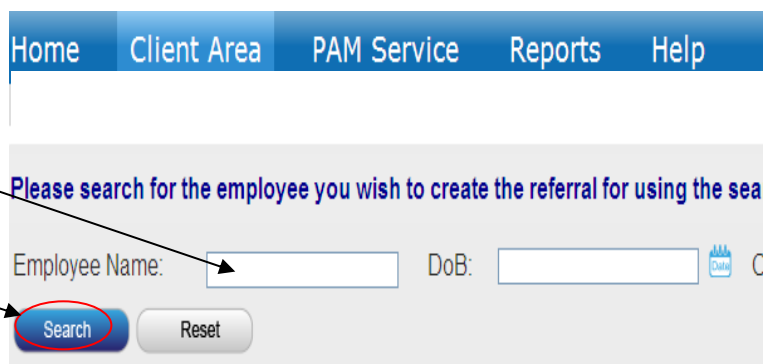
If it is the first time the employee has been referred to Occupational Health using OHIO, then you will have to create a record for them as described above in Section 2 Making a management referral – Create an employee record.

### Access the record of the employee you are referring to PHIL

| Client Area | PAM Service | Reports |
| --- | --- | --- |
| Clients | | |
| Employees | | |
| Management Referrals | | |
| Health Surveillance | | |
| Wellbeing Referrals | | |
| PHIL Referrals | **Add New PHIL Referral** | |

- o Hover your mouse over the 'Client Area' tab to reveal the drop down menu.
- o Hover over 'PHIL Referrals'
- o Click on 'Add New PHIL Referral'.

| Home | Client Area | PAM Service | Reports | Help |

**Please search for the employee you wish to create the referral for using the sea**

Employee Name: [         ]    DoB: [         ]

[Search]   [Reset]

- o Type the employee's Surname and DoB
- o Click on the 'Search' tab

| ERN | Name ▲ | DoB | Client |
| --- | --- | --- | --- |
| 326234 | Admin Ohio | | Glasgow CC Social Work |

Show [20 ▼] records per page.

| Mobile | Action |
| --- | --- |
| 07777777777 | View Select |

- o A link to the employee's record will appear as shown.
- o Scroll to the 'Action' column on the far right of the row and click on 'Select'.

### Complete the online referral form

The online referral form will appear on the screen. You must ensure that you've discussed the referral with the employee prior to completing the form. Use the information captured on the Employee Information pro forma to help you complete the referral form.



Step 1. Select the Employee > **Step 2. Fill out the referral form** > Step 3. Referral Created

**Personal Details:**
ERN:
Person ID:
Title:
Gender:
Forename:
Surname:
DoB:

**Employment Details:**
Client: Glasgow C
Department:
Job Title:

**Contact Details:**
Address 1:
Address 2:
Town:
Postcode:
County:
Telephone:
Mobile:
Email:

**Referring Manager:**
Name:
Title:
Job Title:
E-mail:
Telephone
Mobile:

**Referral Details:**
Has employee been advised a Referral is being arranged?   * ⦿ Yes   ○ No

*Click 'Yes' to confirm that you have checked the details provided are correct.*

OHIO Service:   * PHiL - Physio Triage/Advice Service ▾   *Ignore*

Price:   £29.00 + VAT

Comments:

*Include the reason for referral; details of any related absences; any other information you think is relevant.*

*Ensure that you note any dates/times the employee will be unavailable for the consultation.*

Customer Order Ref:

*Ignore*

Back   Cancel   Continue

*Check that all the details provided are correct and click on 'Continue'*

*The following message will pop up to confirm that the referral has been submitted*



Step 1. Select the Employee > Step 2. Fill out the referral form > **Step 3. Referral Created**

The referral for **Abc Def** 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 **170523**, please use it for further reference.

To Referral List   Create New

Once a consultation has taken place, the clinician will upload the report onto OHIO. You can access the report as follows:

### Access the employee's record

| | |
|---|---|
| o   Go to your Home Page.<br><br>o   Hover your mouse over the 'Client Area' tab to reveal the drop down menu.<br><br>o   Click 'Employees' | **Home    Client Area    PAM Service    Reports**<br><br>Clients<br><br>Employees<br><br>Management Referrals |

| | |
|---|---|
| Client: Warrington Co (Distributi  Employee Name:  ERN:<br>Record Status: Live  Department:  Search  Reset<br>Add New  Import Employees  Export Page  Export All  Bulk Edit | o   Type the employee's Surname<br><br>o   Click on the 'Search' tab |

Show 20 records per page.

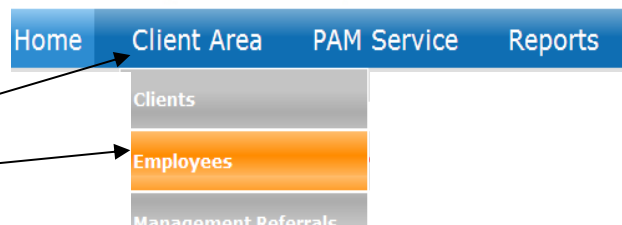| | ERN | Status | Name | Town | DoB | Job Title | Referring Manager | Telephone | Mobile | Acti |
|---|---|---|---|---|---|---|---|---|---|---|
| | 6775 | Live | Allsop Stuart | Manchester | 27/09/1967 | Operative | Trotter Albert | 01234567890 | 07999999999 | View |
| | 6784 | Live | Arnold John | Stalybridge | 29/08/1959 | Operative | Trotter Albert | 01234567890 | 07999999999 | View |
| | 3978 | Live | Hill Harry | Warrington | 23/11/1981 | Warehouse Operative | Trotter Albert | 01942407049 | 07999999999 | View |
| | 6782 | Live | Holmes Andrew | Manchester | 19/08/1961 | Operative | Trotter Albert | 01234567890 | 07999999999 | View |
| | 6785 | Live | Jacoby Derek | Manchester | 23/01/1959 | Operative | Trotter Albert | 01234567890 | 07999999999 | View |
| | 19121 | Live | Jeans Terri | o | 01/01/1950 | test | Trotter Albert | 01925222222 | | View |
| | 3976 | Live | Jones John | Warrington | 13/06/1991 | FLT Operative | Trotter Albert | 01942407049 | 07999999999 | View |

o   Locate the correct employee link.

o   Click on 'View'.

o   The employee's record will appear on the screen.

o   Select the 'Consultation Reports' tab

**General Details** | GP Details | Managers | HS Profile | Consultation Reports | Clinical Area | Diary

Record Status...

**Personal Details:**
ERN: 3976
Person ID:
Title: Mr
Gender: Male
Forename: John
Surname: Jones
DoB: 13/06/1991

**Employment Details:**
Client: * Warrington Co (Distributi
Department: Warehouse
Job Title: * FLT Operative
Has Access To OHIO:

**Contact Details:**
Address 1: * Unit 123
Address 2: Winwick Ind Est
Town: Warrington
Postcode: * WA3 3SP
County: Cheshire
Telephone: 01942407049
Mobile: 07999999999
Email: ohioadmin@people-am.com

**Referring Manager:**
Name: * Trotter Albert
Title: Mr
Job Title: Manager
E-mail: ian.jones@people-am.com
Telephone: 01925123456
Mobile:

Cancel   Print Report   Save

### View the report

A list of consultation reports for the employee will appear. You can choose the report by clicking on the appropriate file name link:

| General Details | GP Details | Managers | HS Profile | Consultation Reports | Clinical Area | Diary |

| Created On | Created By | Referral ID | Appt ID | File Name |
| --- | --- | --- | --- | --- |
| 05/04/2012 16:32 | Jones Ian | 6017 | 13873 | pam_oh_logo.jpg |

You can print a copy of the report if required.

It is critical that CBS are notified of any structural changes within your team which result in you no longer being responsible for the referral of an employee/or group of employees or existing occupational health records on OHIO. This is to ensure that the required steps are taken to ensure that confidential employee records are protected and securely stored at all times.

### Leavers:

If an employee you have previously referred to occupational health on OHIO leaves the Council, you must notify CBS by clearly indicating this on the employee's Exit Processing form. The employee's occupational health record will be safely archived on OHIO, and your access to that particular record will be terminated in line with our information security policy and procedures.

This form will also be used to if *you* leave the Council and will ensure that any existing access to employee records and any referral responsibilities you have are re-allocated to the appropriate manger.

### Transfers:

If an employee/or group of employees transfers within the Council and you are no longer their line manager, you must complete and submit the Transfer Processing form so that your access and responsibility for maintaining those records can be terminated and re-allocated to their new manager.

Similarly, you must complete and submit this form if *you* transfer within the Council and are no longer responsible for existing employee(s) records or referrals. This will ensure that access to employee records and referral responsibilities can be re-allocated to another manager.