



working for us

Occupational Health Service

Guidance on making referrals using OHIO



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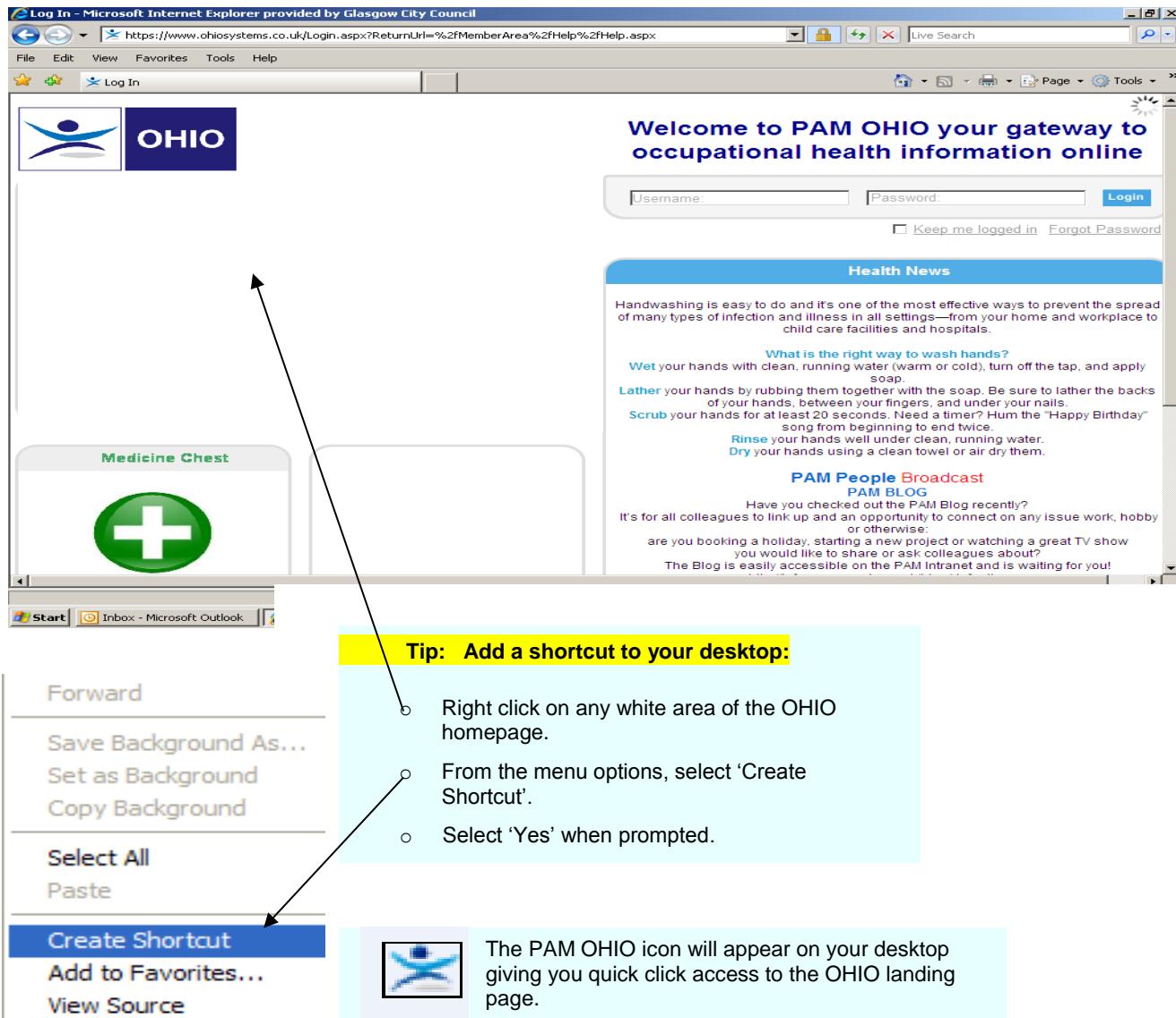
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1. Getting started

Access OHIO

Click on the following web link: [www.ohiosystems.co.uk](https://www.ohiosystems.co.uk/Login.aspx?ReturnUrl=%2fMemberArea%2fHelp%2fHelp.aspx), which will take you to the OHIO landing page below:



Welcome to PAM OHIO your gateway to occupational health information online

Username: Password: Login

Keep me logged in [Forgot Password](#)

Health News

Handwashing is easy to do and it's one of the most effective ways to prevent the spread of many types of infection and illness in all settings—from your home and workplace to child care facilities and hospitals.

What is the right way to wash hands?

Wet your hands with clean, running water (warm or cold), turn off the tap, and apply soap.

Lather your hands by rubbing them together with the soap. Be sure to lather the backs of your hands, between your fingers, and under your nails.

Scrub your hands for at least 20 seconds. Need a timer? Hum the "Happy Birthday" song from beginning to end twice.

Rinse your hands well under clean, running water.

Dry your hands using a clean towel or air dry them.

PAM People Broadcast
PAM BLOG

Have you checked out the PAM Blog recently?
It's for all colleagues to link up and an opportunity to connect on any issue work, hobby or otherwise:
are you booking a holiday, starting a new project or watching a great TV show you would like to share or ask colleagues about?
The Blog is easily accessible on the PAM Intranet and is waiting for you!

Tip: Add a shortcut to your desktop:

- Right click on any white area of the OHIO homepage.
- From the menu options, select 'Create Shortcut'.
- Select 'Yes' when prompted.

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

1. Getting started

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:

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

- Your password must be a minimum of 7 characters and contain at least one capital letter and one number.
- Ensure that it is something familiar and unique only to you, and something that you aren't likely to forget.
- Remember that passwords are case sensitive, so make sure that you enter it exactly each time.

e.g.

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.

- Type your e-mail address in the 'Username' field in the login box.
- Select 'Forgot Password'.
- A new temporary password will be generated by OHIO and sent to you by e-mail.
- 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**



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1. Getting started

OHIO Home Page

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

The screenshot shows the OHIO (Occupational Health Information Online) homepage. At the top is a blue header bar with the OHIO logo and the text "Occupational Health Information Online" and "Welcome to OHIO!". Below the header is a navigation bar with links for "Home", "Client Area", "PAM Service", "Reports", and "Help". A breadcrumb trail "You are here: Home" is visible. To the left is a sidebar with a "Client Area" tab selected. It contains dropdown menus for "Clients", "Employees", "Management Referrals", "Health Surveillance", and "Absence Management". Two arrows point from the text below to these areas: one from the "Client Area" link in the header to the sidebar, and another from the "Management Referrals" link in the sidebar to the "Management Referrals" menu item.

- 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.

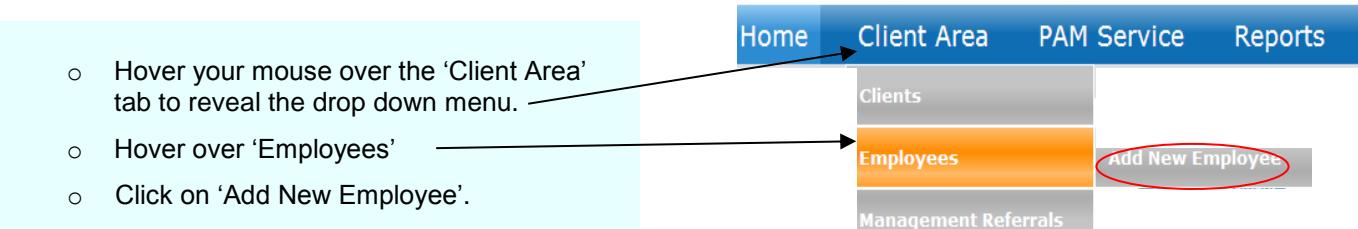
The manager's 'dashboard' is situated directly below the menu bar. It provides an overview of information and alerts that enable you to keep track of what's happening with referrals you have made and employee health surveillance requirements if applicable.

The screenshot shows the OHIO dashboard. At the top, it displays an alert: "You have 1 master appointments scheduled within the next 30 days" with a table showing details like Appointment ID (35426), Date-Time (29/11/2013 09:00), Clinic (Warrington Dist Admin), Clinician (Pam Newton), Duration (Full Day), Referrals booked in (2), and Action (View). Below this is a "Show All Master Appointments" link. Further down, there is an alert: "You have 4 employees due a health assessment within the next 3 month. View Health Surveillance Recall Report". The main area is titled "Health Surveillance Recalls" and lists five entries with columns for Location, Employee Name, Employee Job Title, ERN, Date Of Birth, Health Surveillance Type, Status, Date Last Medical, Recall Weeks, Due Date, Traffic Light, and Action. At the bottom, there is a section titled "OHIO Referral Statistics for your Employees - September, October and November" with a pie chart showing the distribution of referrals by type: Management Referrals (39), HS Referrals (18), WB Referrals (3), and BW Referrals (12). Below the chart are buttons for "New Management Referral", "New Health Surveillance Referral", and "New Wellbeing Referral".

2. Making a management referral

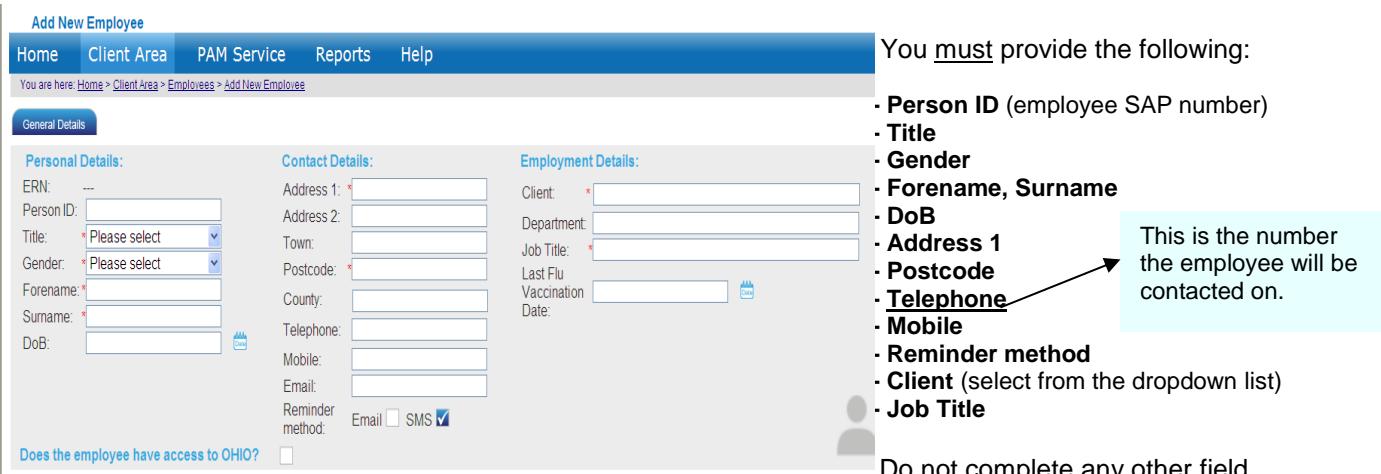
Create an employee record

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:



- Hover your mouse over the 'Client Area' tab to reveal the drop down menu.
- Hover over 'Employees'
- 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.



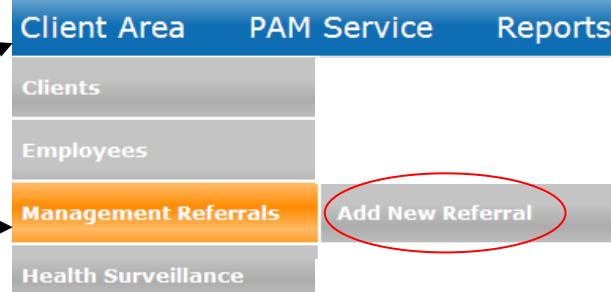
- Check that you have provided all the information required.
- Scroll along to the far right of the screen and click on 'Save'.
- The employee has been added to the system and you can now make a referral for them.

The employee record has been created.

2. Making a management referral

Access the record of the employee you are referring

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



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

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 search fields below.

Employee Name: DoB:

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

ERN	Name	DoB	Client
326234	Admin Ohio		Glasgow CC Social Work

Show 20 records per page.

Mobile	Action
07777777777	<u>View</u> Select

2. Making a management referral

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	Client: Department: Job Title: Click 'Yes' to confirm that you have verified the details with the employee at your meeting with them.
Are the employees personal details correct? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="button" value="Amend"/>		
Referral Details Step 2.1 About The Employee >		
<p>Click on light bulb icon for helpful tips</p> <p>Has employee been advised a referral is being arranged? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is the employee a shift worker? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No First Date of illness: * 03/05/2014 <input type="button" value="Date"/></p> <p>Is the employee in work currently? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No First Date of absence: * 05/05/2014 <input type="button" value="Date"/></p> <p>Can short term work place adjustments be made? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If the employee is not currently in work you will need to provide the dates in the above fields.</p> <p>This should be marked 'yes'</p> <p><input type="button" value="X Cancel"/> <input type="button" value="< Back"/> <input type="button" value="Continue >"/></p> <p>Check that you have provided all the required information and click on 'Continue'</p>		

2. Making a management referral

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 >

<p> Reason for Referral:</p> <p>Short Term Absence <input type="checkbox"/> Frequent or sporadic sickness please provide details below</p> <p>Long Term Absence <input type="checkbox"/> 21 days absence - longer than <small>or likely to be longer than</small></p> <p>Bakery Worker Health Screening <input type="checkbox"/> Bakery worker health screening</p> <p>Presenteeism <input type="checkbox"/> In work not on full duties</p> <p>Follow up review <input type="checkbox"/> Employee needs a further consultation</p> <p>Other <input type="checkbox"/> Other management concerns</p> <p>Employees Reason for Absence: Manager add comments</p>	<p>Select the appropriate checkbox to indicate the reason for referral.</p> <p>Please provide information relevant to the referral:</p> <ul style="list-style-type: none"> • e.g. the reason for absence, if applicable; • the condition/issue you're seeking advice on; • supports explored; • any further questions not included above. <p>***Important: Please also indicate:</p> <ul style="list-style-type: none"> • 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.
<p>Initial Referral: <input type="text" value="Please select"/></p> <p>Service Required: <input type="text" value="Please select"/></p> <p> Do you require a pre consultation briefing with our clinician? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you require a post consultation briefing with our clinician? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Ignore</p> <p>Select 'Management Referral'</p>
<p>It may be helpful to discuss the case with the clinician before and/or after the consultation.</p> <p>If you want the clinician to contact you, click the 'Yes' box.</p> <p>*** Remember to provide your contact telephone number.</p>	



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2. Making a management referral

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:

Tick appropriate boxes to indicate the advice you require.

What is the employee's current fitness for work?

Likely date of return to work?

What effect will this condition have on the employee's 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:

Choose File Upload Customer Order Ref: _____

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

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.

Once you have chosen the file, click on 'Upload'

Ignore

3. Making a workstation/DSE assessment referral

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.

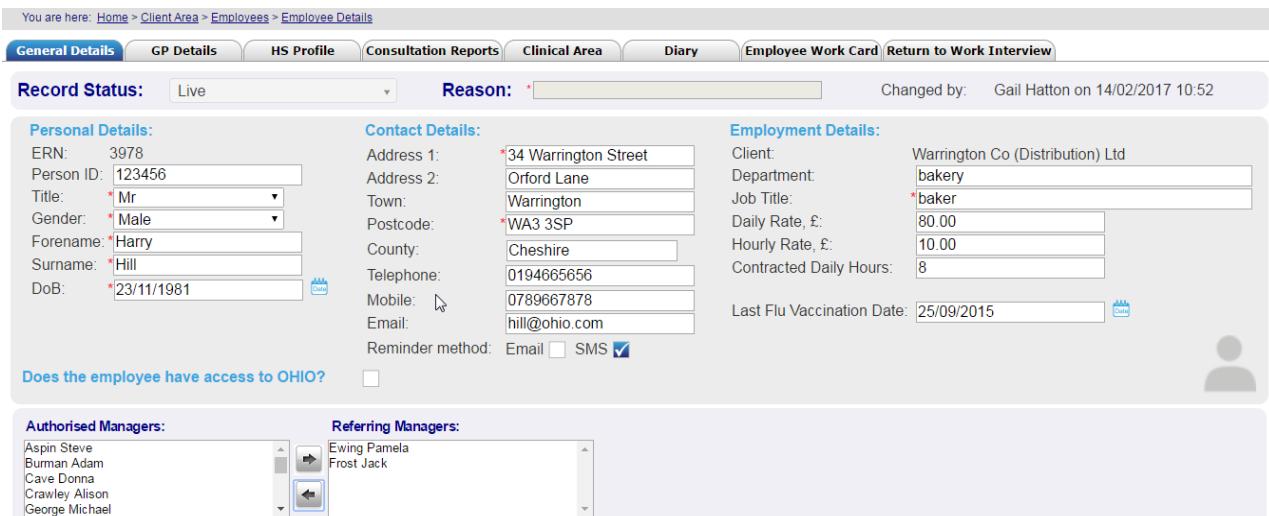


The screenshot shows the 'Employees' section of the OHIO software. At the top, there's a navigation bar with links for Home, Client Area, PAM Service, Administration, EAP, Reports, and Help. Below the navigation bar, a search bar is labeled 'Search employees by' with fields for Client (containing 'Hill Harry'), Employee Name (containing 'Hill Harry'), and ERN (empty). There's also a 'Record Status' dropdown set to 'Live'. To the right of the search bar are buttons for 'Select' (highlighted in blue), 'Tick See All' (also highlighted in blue), and checkboxes for 'See All' and 'Flu Vaccination Date'. Below the search bar is a table with columns for ERN, Status, Name, Client, DoB, Job Title, Telephone, Mobile, Vaccination Date, and Action. A single row is visible: ERN 3978, Status Live, Name Hill Harry, Client Warrington Co (Distribution) Ltd, DoB 23/11/1981, Job Title baker, Telephone 0194665656, Mobile 0789667878, Vaccination Date 25/09/2015, and Action View Print. The bottom right corner of the table shows a total of 1 record.

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.



The screenshot shows the 'Employee Details' page. At the top, there's a breadcrumb trail: You are here: Home > Client Area > Employees > Employee Details. Below the breadcrumb are tabs for General Details (selected), GP Details, HS Profile, Consultation Reports, Clinical Area, Diary, Employee Work Card, and Return to Work Interview. The General Details tab contains sections for Personal Details (ERN 3978, Person ID 123456, Title Mr, Gender Male, Forename Harry, Surname Hill, DoB 23/11/1981), Contact Details (Address 1 34 Warrington Street, Address 2 Orford Lane, Town Warrington, Postcode WA3 3SP, County Cheshire, Telephone 0194665656, Mobile 0789667878, Email hill@ohio.com), and Employment Details (Client Warrington Co (Distribution) Ltd, Department bakery, Job Title baker, Daily Rate £ 80.00, Hourly Rate £ 10.00, Contracted Daily Hours 8, Last Flu Vaccination Date 25/09/2015). Below these sections is a question 'Does the employee have access to OHIO?' with a checkbox. At the bottom, there are two lists: 'Authorised Managers' (Aspin Steve, Burman Adam, Cave Donna, Crawley Alison, George Michael) and 'Referring Managers' (Ewing Pamela, Frost Jack).



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3. Making a workstation/DSE assessment referral

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

Health Assessment	Assessment Type	Last Medical Date	Due Date	Guidance	Current Status
Varicella Serology Immunity	Blood Test		23/02/2015	N/A	Not assigned
Vision Screening HS	Health Surveillance	17/03/2014	16/03/2015	N/A	Assigned
Vision Screening HS OHS	Health Surveillance		23/02/2015	N/A	Not assigned
Work Station Assessment	Health Surveillance		23/02/2015	N/A	Not assigned
Workplace Medical	Health Surveillance		23/02/2015	N/A	Not assigned
Workplace Risk Assessments	Health Surveillance		23/02/2015	N/A	Not assigned

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

Complete the online referral form

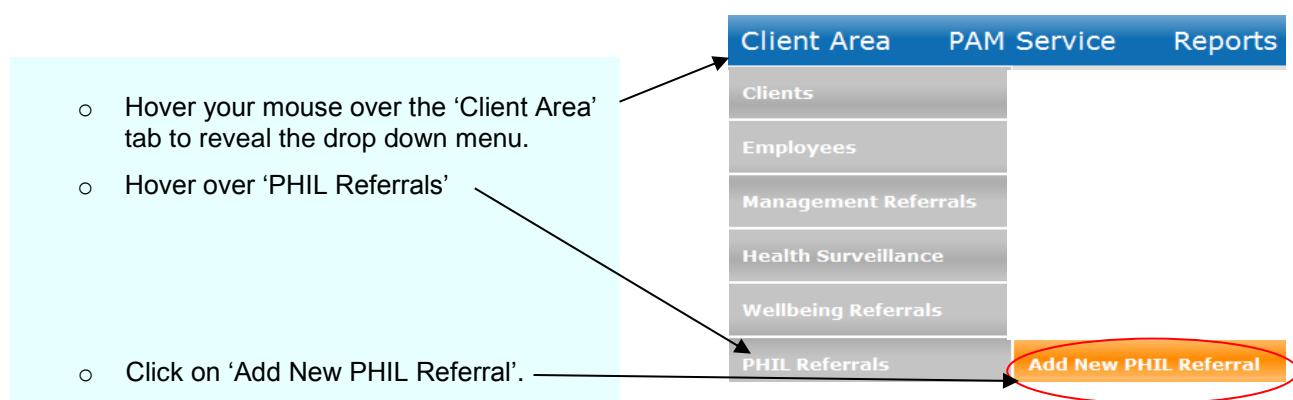
This will take you to the Health Surveillance referral page where you will complete the referral form as normal. See [Section 2 Making a management referral – Complete the online referral form.](#)

4. Making a physiotherapy referral (PHIL)

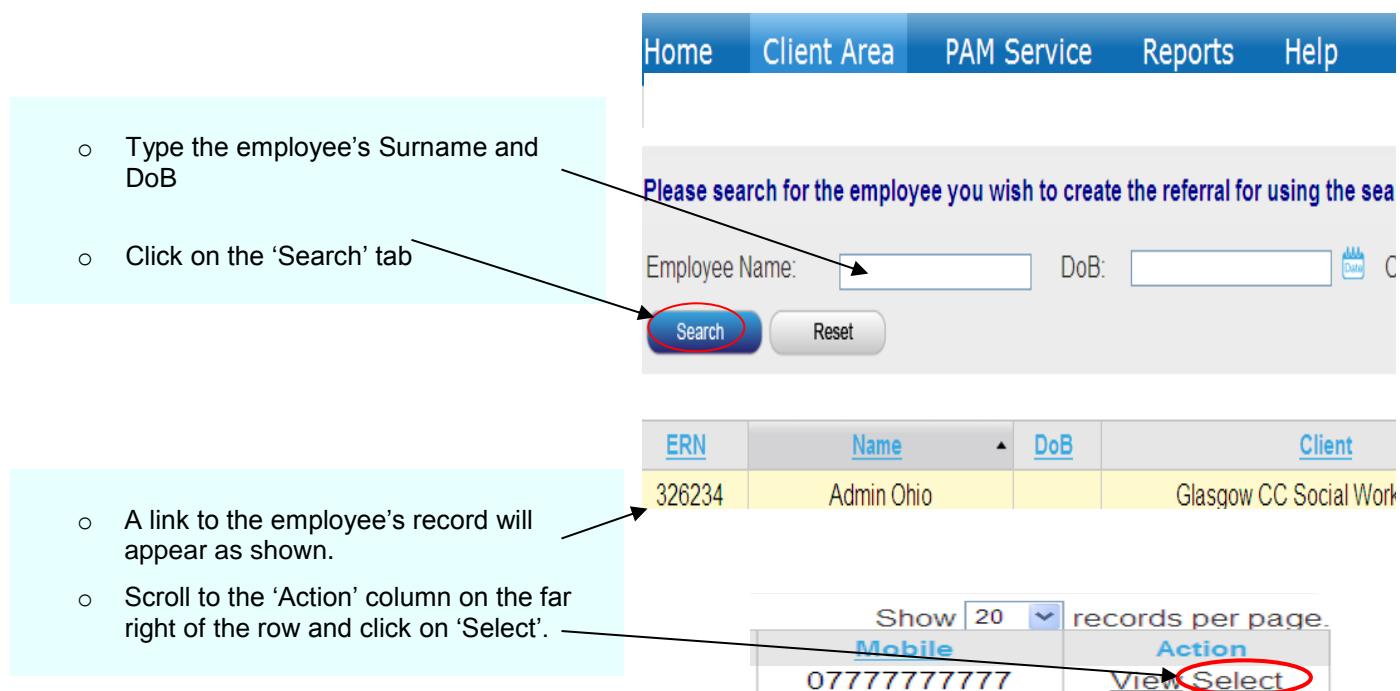
Create an employee record

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



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



- Type the employee's Surname and DoB
- Click on the 'Search' tab
- A link to the employee's record will appear as shown.
- Scroll to the 'Action' column on the far right of the row and click on 'Select'.

ERN	Name	DoB	Client
326234	Admin Ohio		Glasgow CC Social Work



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4. Making a physiotherapy referral (PHIL)

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:
Price:
Comments:
Customer Order Ref:

* PHIL - Physio Triage/Advice Service £29.00 + VAT

Ignore

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

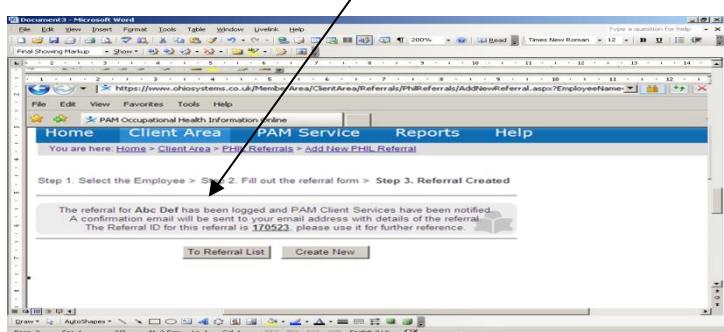
Ensure that you note any dates/times the employee will be unavailable for the consultation.

Ignore

Back Cancel Continue

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

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



5. Accessing a consultation report

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

- Go to your Home Page.
- Hover your mouse over the 'Client Area' tab to reveal the drop down menu.
- Click 'Employees'



Client:	Warrington Co (Distributi	Employee Name:	<input type="text"/>	ERN:	<input type="text"/>					
Record Status:	Live	Department:	<input type="text"/>	Search	<input type="button" value="Reset"/>					
<input type="button" value="Add New"/> <input type="button" value="Import Employees"/> <input type="button" value="Export Page"/> <input type="button" value="Export All"/> <input type="button" value="Bulk Edit"/>										
Show 20 records per page.										
	ERN	Status	Name	Town	DoB	Job Title	Referring Manager	Telephone	Mobile	Action
1	6775	Live	Allsop Stuart	Manchester	27/09/1967	Operative	Trotter Albert	01234567890	07999999999	View
2	6784	Live	Arnold John	Stalybridge	29/08/1959	Operative	Trotter Albert	01234567890	07999999999	View
3	3978	Live	Hill Harry	Warrington	23/11/1981	Warehouse Operative	Trotter Albert	01942407049	07999999999	View
4	6782	Live	Holmes Andrew	Manchester	19/08/1961	Operative	Trotter Albert	01234567890	07999999999	View
5	6785	Live	Jacoby Derek	Manchester	23/01/1959	Operative	Trotter Albert	01234567890	07999999999	View
6	19121	Live	Jeans Terri	o	01/01/1950	test	Trotter Albert	01925222222	07999999999	View
7	3976	Live	Jones John	Warrington	13/06/1991	FLT Operative	Trotter Albert	01942407049	07999999999	View

○ Type the employee's Surname
 ○ Click on the 'Search' tab
 ○ Locate the correct employee link.
 ○ Click on 'View'.
 ○ The employee's record will appear on the screen.
 ○ 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
 Manager
 E-mail: ian.jones@people-am.com
 Telephone: 01925123456
 Mobile:



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5. Accessing a consultation report

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.



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6. Maintaining OHIO records

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 manager.

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.