OPAS G2

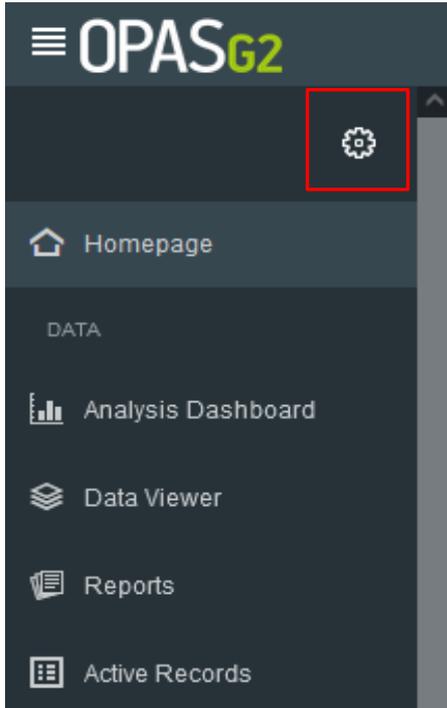Management Referral – Manager Process Only

January 2022

Contents

Introduction

This guide is to details how a user of the OPAS G2 uses Management Referral Configuration in G2.

The guide will explain the following information:

- Using the G2 System
- Creating a Referral
- Consent
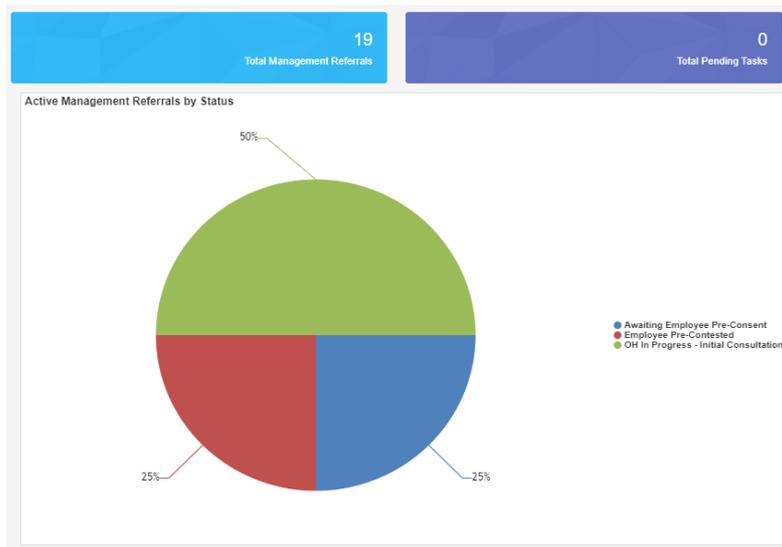
Using the G2 System

Use the Menu on the left-hand side as the main navigation through the system.

This user guide focuses on Management Referral from the Manager point of view.

Management Referrals

Log in as a Manager

Upon logging in, the Homepage will chart the Active Management Referrals you have open and their corresponding status
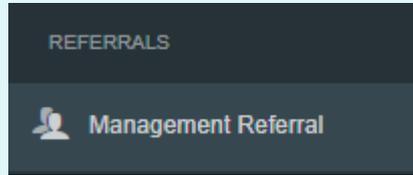

The right-hand side of the screen will show recent management Referrals. Select the Referrals from here or select the 'Total Management Referrals' blue panel at the top of the screen to show all of your referrals.
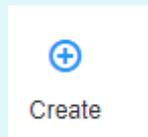
Creating a Referral

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'

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 *

[   ]   [   ]

Date Of Birth   National Insurance Number

[📅 DD/MM/YYYY   ]   [   ]

Job Title *   Employment Location *

[⌄]   [⌄]

Email Address *   Telephone Number

[   ]   [   ]

Home Address

[🏠 Address input   ✏]

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 Specifications.

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

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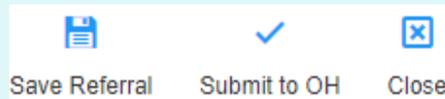
Additional questions can also be submitted using the **'Add Additional Questions'** button.

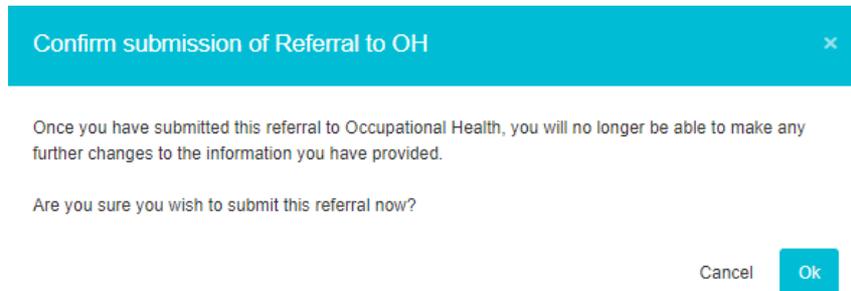The Manager must confirm if they have or don't have the employee consent

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

Yes	No

Once all sections are complete select '**Submit to OH**' from the top right.

Note – the referral can be saved at any point using the save icon here.

💾	✓	☒
Save Referral	Submit to OH	Close

Confirm submission of the Referral by selecting '**OK**'

Confirm submission of Referral to OH   ✕

Once you have submitted this referral to Occupational Health, you will no longer be able to make any further changes to the information you have provided.

Are you sure you wish to submit this referral now?

Cancel   Ok

Confirmation that the Management referral has saved will display.

The confirmation will also detail any automated communications that have been sent.

Management Referral Saved

✓
Continue

Management Referral Saved

The following actions and communications also occurred:

Management Referral - Referrer has submitted a Referral Email was sent to g2.occhealth@gmail.com ✓
Management Referral - Submitted To OH Email was sent to g2.referrer@gmail.com ✓

Select '**Continue**'

The Management Referral Dashboard will display

The submitted Referral will now display under **'Awaiting OH Triage'.**

The progress of the submission can be monitored using the blue bars

Management Referrals can be deleted after submission. However, they cannot be deleted once OH triage the submission.

Consent

Pre-Consent

Pre-consent is a feature that can be turned on or off in the G2 system. If Pre-consent is turned on when the Referrer has completed the referral, an email will be sent to the employee asking for their consent.

Its only when the employee gives their consent will the referral arrive with the OH department.

Pre-Consent can only be turned on or off by a Administrator

Once turned on by the Administrator, when a Manager completes the Referral form they will no longer see an option to send to OH.

Instead, the option will be to **'Submit & Request Consent'**

A notification will show an email has been sent to employer to gain consent

In the Management Referral Dashboard, the referral will now be marked 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	Open

The Employee will now receive an email asking for their consent

Status Updates as OH Progress the Referral

As the referral is progressed by the OH Team the status of the referral will update. You will not be able to see any clinical information, but you will be able to see a timeline of events.

Select either of the **'Management Referrals' options** from the homepage

The *Management Referral Dashboard* will display.

You can see the status of any referral in the corresponding section

Or use the filters to narrow down the number of referrals you have submitted reason or type

To review more details, select to **'OPEN'** a refer

The status will display at the top of the page

You can review the details originally submitted on the left of the page.

A timeline of events will show down the right-hand side of the page. This will update LIVE as appointments are added and completed.

Receiving A Response from the OH Team

Whenever a consultation is completed, and a corresponding update is completed to be shared with you as the referrer, this will be done via the application.

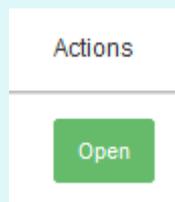*Please Note* - This is pending Employee Consent being provided to share the report.

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.

The referral may appear in the **'Recent Referrals'** on the home page

If not select **'Management Referrals'**
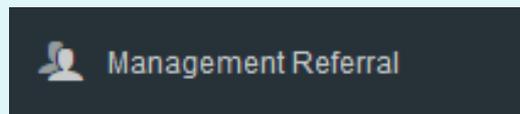
From the Dashboard select to **'Open'** the corresponding referral. This should be under **'Recently Completed'**

The timeline will show the referral is completed.

The main body of the page will display the original referral AND an OH advice section.

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

The OH Team will have answered the questions you requested, provided any further relevant information.

And detailed any adjustments required

Interim Updates

If the referral is still ongoing, but the OH Team wish to 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

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

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

Click **'Open'**

This provides the same information as the OH Advice detailed above but is an Interim report. The Referral is ongoing and the OH Team may yet have further consultations or actions with the employee

Document Control

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