

## A Guide to Making an Online Referral to Occupational Health

Before completing the referral, please ensure you have sought consent from the employee to be referred to occupational health and to be contacted to arrange a consultation. As per instructions from HR, you will need to enter the employees date of birth, so please request this before completing the referral.

1. Go to the following address

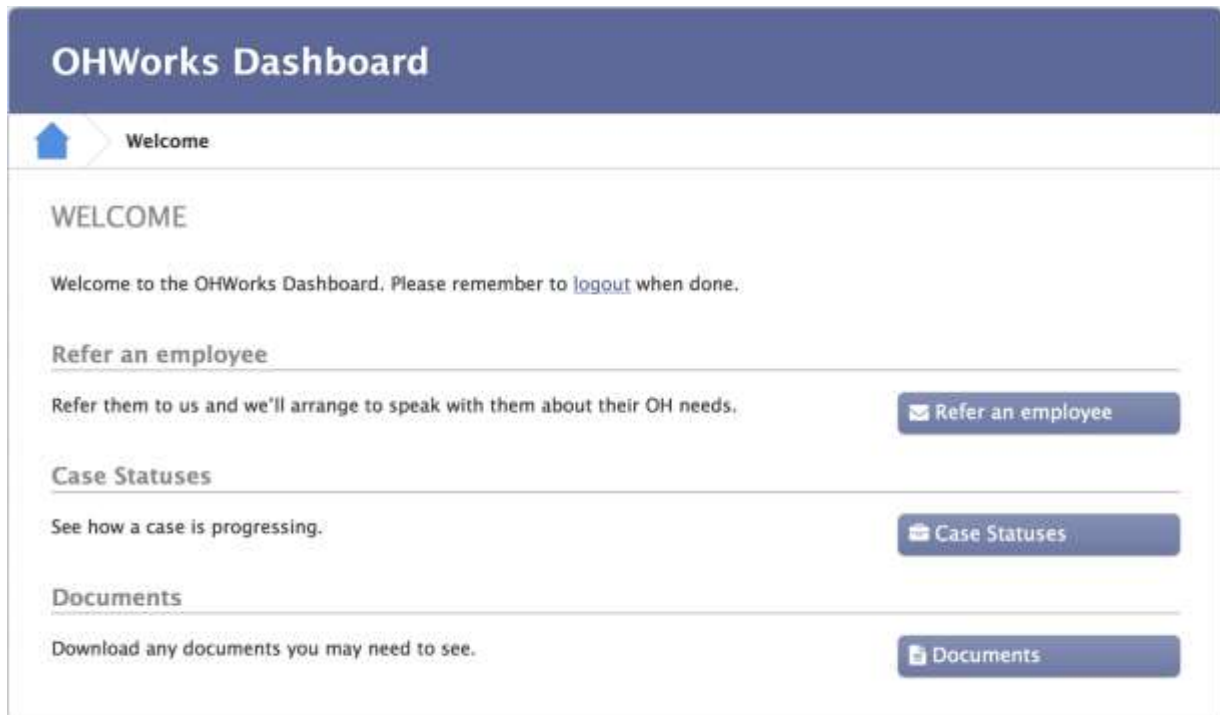
<https://orchidlive.com/orchid/dashboard/default/login>

2. This is the Dashboard Log in page. Log in using the details emailed to you. The account number for Queen Mary University of London (staff) is 424.



The screenshot shows the 'Occ Health Dashboard' login interface. It features a dark blue header with the title 'Occ Health Dashboard'. Below the header, there are three input fields: 'Account number' (a small box), 'E-mail or username' (a larger box), and 'Password' (a box with a small eye icon). At the bottom of the form, there are two buttons: 'Login' with a right-pointing arrow and 'Request access' with a lock icon. Below the buttons, there is a link that says 'Looking for the clinician login?'.

3. This takes you to your OHWorks Dashboard where you can make your referral to Occupational Health.



4. After selecting 'Refer an employee', search for the name of the person you are referring. If you cannot find their name, you will need to manually input their basic details (name, address, job title, directorate, contact details, etc).



5. There is a simple referral questionnaire with sections that should be self-explanatory. Please make sure you use the dropdown box next to 'Contract' and select 'Queen Mary University of London Staff'.

# OHWorks Dashboard



Refer an employee

Enter details

## REFER AN EMPLOYEE

Please fill in as much detail as you can. Required fields are marked with an asterisk \*.

### Basics

Title	<input type="text"/>
First Name *	<input type="text"/>
Surname *	<input type="text"/>
Known as	<input type="text"/>
Contract	<input type="text" value="None"/>

### Details

Date of Birth *	<input type="text" value="DD-MM-YYYY"/>
Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>
Country	<input type="text"/>

6. Please make sure you use the dropdown box next to 'Manager' and select your name.

### Employment details

If you change any of the following, make sure to put the date of the change above.

Occupation	<input type="text"/>
School/Department	<input type="text"/>
Manager	<input type="text"/>
Employment terms	<input type="text"/>
Job title	<input type="text"/>

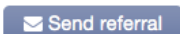
### Referral details

Preferred consultation method	<input type="text"/>
Is this referral work-related?	<input type="text"/>
Reason(s) for referral	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

- There is also a facility to allow you to attach any documents you think our advisor might need to see (a sickness absence record, for example).

📎 0 attachments to this page

Add attachment(s):  no files selected  Allow non-clinical users to see this file  
 You may upload multiple files at once; Current total size: n/a. Maximum total size 50.00MB.

 Send referral

- When you are finished click 'Send referral'.
- OHWorks will receive an email alert that a referral has been submitted.
- You will receive an email confirming your referral has been submitted and it has been received.

**Subject:** [Dashboard] You referred an employee

**Thank you**

This is an automatic acknowledgement to say that you have successfully referred an employee named Micky Mouse to occupational health. We will get in touch with the employee and make arrangements to progress this referral.

Thank you for making this referral. If you have any queries, please get in touch.

Kind regards,  
OHWorks

Open (1)		Closed (0)		All (1)		
Opened date	Received date	employee	Status	Events	Staff	Contract
16/07/2020	16/07/2020	Frank Zappa	Report ready for Manager/HR	0	Tony Berry	Queen Mary University of London staff

Showing 1 to 1 of 1 entries

Previous **1** Next

- Before your referral is actioned by Occupational Health, it will be checked by Human Resources. HR will receive a notification email that a referral has been submitted and for which employee. A member of the HR team will go to the 'Case Statuses' section of the Dashboard and find your referral. They will then click on the icon on the far right.
- This will open the online referral document and HR can check they are happy with the content.

HR contact person

HR telephone

## Details

Preferred consultation

Video (e.g. Teams, Skype, Google Meets)

**OHWorks Dashboard**

Welcome

**WELCOME**

Welcome to the OHWorks Dashboard. Please remember to [logout](#) when done.

**Refer an employee**

Refer them to us and we'll arrange to speak with them about their OH needs.

[Refer an employee](#)

**Case Statuses**

See how a case is progressing.

[Case Statuses](#)

**Documents**

Download any documents you may need to see.

[Documents](#)

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13. If HR wants to make any changes to the referral, they should email [qmulstaff@ohworks.co.uk](mailto:qmulstaff@ohworks.co.uk) advising what changes are needed and OHWorks will update the referral. If they are happy with the referral and want to us to proceed, they should email us at the same address to confirm this.
14. The manager and HR can track the progress of the referral 24 hours a day by checking the 'Case Statuses' section from your Dashboard.

15. At all stages we will give the referral a 'Case status'. The default status when the referral is submitted and received but no action has been taken is 'To process'. Subsequent statuses could include:

- Requires F2F appointment with OHA
- Requires telephone consultation with OHA
- Requires F2F appointment with OH Physician
- Cannot contact employee
- Appointment booked
- Attended appointment
- Did not attend appointment
- Employee cancelled appointment
- Awaiting consent from employee to send report
- Report sent to HR/manager
- Review appointment needed
- Review appointment booked
- Case closed

16. When the report is ready you will be sent an email alert informing you the report is ready online. The report will be saved in the 'Documents' section from your Dashboard. From here you can also download the document or read it online.

17. The report will be shared with the employee through Orchid, they will receive an email with a link to the report and for security reasons a 16-digit code via text message in order to download their report.

18. If no review appointment has been recommended, then once we see that you have accessed and read the report, we will confirm with you that the case can be moved to the 'Closed' cases folder in the 'Case Statuses' section of the Dashboard. The report will remain in the 'Documents' section and you can use this as your online archive of reports about employees you have referred to Occupational Health.