

Customer User Guide: OPAS Management Referral

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SCOPE

This guide provides the user 'manager' with easy to follow how to instructions for completing a Management Referral request using OPAS. The scope of this guide is limited to this process and will cover:

- 1. Logging on to the OPAS portal
- 2. Entering all required and relevant information and capturing consent
- 3. Submitting the completed Management Referral
- 4. A few helpful general notes and features

ABBREVIATIONS

DOB – Date of Birth OH – Occupational Health UKIM OH&WB – UKIM Occupational Health & Wellbeing

INTRODUCTION

OPAS G2 has been developed by Civica to streamline, simplify and secure the process for Occupational Health advice. It is a role based web-portal accessible from anywhere at any time enabling customers to make a Management Referral request and receive updates at a time and location of their choosing. The portal also allows users to track progress through its intuitive timeline, send messages and receive alerts as required.

If users have any questions or ideas for improvement about this portal service, then please do not hesitate to contact us at: <u>wellbeing@ukindmed.com</u> or 0191 512 8220.

SECURITY

The OPAS G2 website is secure and fully SSL certified. This means that it has a security certificate in place that ensures that firstly, the website is who it says it is, and secondly, that all information sent to and from it cannot be intercepted by any third parties.

The portal is built on the IBM cloud which is the most secure and resilient platform in the world for data storage. Data backups are taken care of automatically and are encrypted and retained within the UK giving customers peace of mind that data is safe and secure.

All users are required to authenticate in order to gain access to the system and can only access services they have been given access to during our set up process. These access controls will have been agreed with customers in advance. It is expected that users will maintain the security of usernames and passwords that are used to access the portal.

Civica are ISO 27001 certified and are Cyber Essentials accredited.



GETTING STARTED

When accessing the portal for the first time users will receive an email from <u>noreply@opasg2.com</u> with a link to reset the password for access.

Using the internet browser go to https://ukim.opasg2.com/login/form enter username and password. User names are: firstname.surname e.g. mary.smith.

Login to your account
Enter your credentials below
9 James.Manager
۵
Login

HOW TO CREATE A MANAGEMENT REFERRAL

From the left-hand menu choose **Management Referral** and then select **Create** visible in the top right corner of the screen. Proceed to complete the Referral details using the form provided:

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Let Analysis Dashboard	Recently Finished	Pending	Requires Further Information	Awaiting OH Triage	1 In Progress	Archived
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HEALTH SURVEILLANCE	Accepted by OH	Employee Name	Current State	Referral Type		Actions
Surveillance Programmes	26/02/2020 D days 19 hours ago	Adam Adams	Awaiting Initial Consultation	Long Term Sickness Absence		Open
REFERRALS	Archived		These are historic referals which has	ve finishind and you have mylewind		
. Management Referral						
10 10 1000						

Please note that the **Details of the Referrer** will auto-populate with the users details. Additional contributors can also be added at this point.

Additio	dditional Contributors				
Adding p	ing 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	Enter the Name or Date of Birth of a person you wish to add as an additional contributor				
Name (Reference) Employment Details Email Address Telephone Number		Telephone Number			
No a	No additional contributors have been specified for this referral				



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DATA	Current Status: Pending (Mare Hel)				
de Analysis Dashboard	Referral Details			FENDING	~
Data Viewer	Details of the Referrer				
HEALTH SURVEILLANCE	These are the current details held about yourself. If any of the details are incorrect, please update them. *				
E Surveillance Programmes	Full Name	Employment Details			_
	James Manager (Test)	Line Manager			
REFERINALS	Email Address	Telephone Number			
Anagement Referrat	opasg2 projects@gmail.com				
(U) Logout	Employee Details Please enter the details of the employee you wish to refer * Given Name *	Farry hame *			
	Case Of Birth	National Insurance Number			_
	DOWINYYYY				
	Job TBE *	Employment Location *			
	Email Address *	Telephone Number			

Entering Employee Details

Start by free typing the employee name into the **Given Name (first name)** and **Family Name (surname)** which will prompt the system to provide a list of names used previously as a short cut thus allowing users to select the name if it is already in the list. If the employee is not already in the system, **Create New**.

When adding in the **Date of Birth**, select this from the calendar that appears or simply enter this freely.

Enter the National Insurance Number if available.

Select the appropriate **Job Title** from the list provided. Where the job title required for the employee is not available, please select **Other** and enter details of this into the field.

To choose an 'Employment' click in the search bar and select from the drop down list.

Employment Location *	Employment Location *
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Always enter the employees email address, contact number (preferably not their work number) and home address into the fields provided.

As most of our appointments are remote, providing the correct telephone contact details ensures the service runs efficiently and avoids delays.



Capturing the Reason for Referral:

Select 'Reason for Referral' and select a reason from the drop-down list provided:

Reason for Referral				
Please	e select the referral type *			
٩				
Fitness For Work				
Frequent Short Term Sickness Absence				
Long Term Sickness Absence				
Retu	urning To Work			
Sup	port To Remain At Work			
Wor	k Related III Health			
Wor	k Related Injury			

Complete all <u>mandatory</u> fields (mandatory fields will have a red star next to them) detailing the specific reason for the Referral and where possible complete the sections that follow, entering any information that will help our OH professional build a picture of the background and reasoning behind the Referral.

Reason for Referral		
Please select the referral type *		
Fitness For Work		
Please provide full details of the specific reason for this referral *		
1		
Please provide any background information which is relevant for this referral request		
What action has management taken in dealing with this case to date?		
What is the expected outcome of the meeting with occupational health?		

Confirm consent through the **Has the Employee been notified you are making this referral to UKIM Occupational Health & Wellbeing and we will be contacting them regarding this referral?** by selecting **Yes** or **No**. Where **Yes** is selected, should an employee notify UKIM OH&WB that they have not consented, we will make direct contact with the referrer before proceeding any further.

Please provide information about the employees **Working Environment** using the two boxes shown below:

Working Environment	
Details of their normal duties and any physical demands within their job	
Details of their working environment	



With regards to entering **Absence Details**, if the employee is NOT absent then select **No** and move to the next step, if **Yes**, complete the relevant fields with the absence dates and reason.

Rea	son for Absence *
m	1
N	lental Health

If the absence is a result of an **Accident at Work or Work Related III Health**, users will be required to add documents and detail relating to this. Complete the further details field and drag and drop any documents into the relevant field or using the **Browse for file** function to select a document and upload.

ſ	Please attach any documentation by either dragging the documents below, or using the Browse for files button shown *		
	Drag your files here or Browse for files		
	· · · · · · · · · · · · · · · · · · ·	l	

Should the user wish to remove any documents added in error, select the **Trash** icon to remove.

Please attach any doci	umentation by either dragging the documents below, or using the Browse for files button shown *	
Drag your files here	Of Browse for files	
1 document uploade	ed	
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The **Job Role Specification** options are not mandatory fields however please select **Yes** to any that are appropriate to employee's job role. **No** to non-relevant.

Job Role Specifications	
Professional Driver	Shift Work
Yes No	Yes No
Safety Critical Tasks	Food Handler
Yes No	Yes No
Vork with Vibrating Equipment	Lone working
Yes No	Yes No

Should the user select **Other**, please ensure a brief description is provided.



HSE Approved Health Surveillance required	Other
Yes No Briefly describe the Employee's work duties:	Yes No

Advice Required from Occupational Health:

Where **Yes** is selected, this will form a section for the final report. Any questions that are not relevant to the case should be marked as **No**.

Advice	required	d from Occupational Health
Please se	elect the qu	uestions from the list below which you wish the OH department to answer in regards to this referral.
Is the em	ployee me	dically fit for their current role?
Yes	No	
Would an	ny adjustme	ents 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 expect	ted timescales for the employee regaining fitness for work?
Yes	No	

Users can add any further relevant documents to the Referral by dragging and dropping the document to the area provided or using the 'Browse for file' function to select a document. Examples may include job descriptions, absence records or any health professional reports/advice.

Documents								
Please attach th button shown.	Please attach the following where applicable: Job Description, Accident Report, Absence Reports, Risk Assessment, Medical or other Supporting Information along with any other relevant documentation to this referral by either dragging the documents to the area below, or by using the Browse for files button shown.							
Drag your files	here of Browse for likes							
3 documents	uploaded							
D	Policy on conflicts for UKIM (2) docx		WH OH Assessment form 19Feb2020.docx					
*	Hydrangeas.jpg							

To complete the **Declaration** ALL questions must be read and **Yes** selected before the Referral can be submitted.



Declaration	
Do you confirm that the reason for this referral has been fully explained to the employee and that the employee agrees with the referral to UKIM. Occupational Health & Welbeing and understands that an occupational health report will be sent back to you, the employee, with their consent advising you about how you might be able to help imminer from a work perspective taking into account the employee surrent health problems/symptoms/underlying condition(s) * Viso Do you confirm that the employee consents to UKIM Occupational Health & Welbeing relating relevant personal and health information as required in order to process this referral and that they understand their rights under the Data Protection Act (further information can be found at WW/Loo org uk)* No	Do you confirm that the employee consents to the consultation taking place and that the content of the Occupational health report will be discuss and agreed with him/her during the consultation with the UKIM Occupation Health professional * Yes No

When the Referral is complete select **Submit to OH** or **Save** for submission when appropriate.

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On submission, any mandatory fields that have not been completed will be highlighted. Users will not be able to complete submission until such fields have been completed.

Users will be asked if to confirm before submission will be complete, there is an option to choose **Cancel** to continue to make any changes to the Referral.

Confirm submission of Referral to OH	
Once you have submitted this referral to Occupational Health, you will no longer be able to n further changes to the information you have provided.	nake any
Are you sure you wish to submit this referral now?	
Cancel	Submit

Users will receive notification that the submission has been successful. Simply choose **Continue** to close this message.

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 wellbeing@ukindmed.com 🗸 Management Referral - Submitted To OH Email was sent to opasg2 projects@gmail.com 🗸	

Once the message is closed the **Management Referral Dashboard** will appear and the Referral should be displayed under the **Awaiting OH Triage** section.



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😂 Data Viewer	 Awaiting OH Triage 		These records have been submitted and are waiting to b	e reviewed by the OH team		و
HEALTH SURVEILLANCE	Submitted to OH	Employee Name		Referral Type		Actions
Surveillance Programmes	27/02/2020 0 days 0 hours ago	Peter Parker		Fitness For Work		Open
REFERRALS	In Progress		These records are currently being processed by t	the OH learn		
A Management Referral	Accepted by OH	Employee Name	Current State	Referral Type		Actions
U Logout	26/02/2020 0 days 22 hours ago	Adam Adams	Awaiting Initial Consultation	Long Term Sickness Absence		Open
	Archived					6

GENERAL NOTES AND FEATURES

Users can review the progress of the Referral at any point either from the **Dashboard** or **Management Referral** by selecting the green **Open** icon next to the relevant Referral:

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HEALTH SURVEILLANCE	Submitted to OH	Employee Name		Referral Type		Actions
Surveillance Programmes	27/02/2020 0 days 0 hours ago	Peter Parker		Fitness For Work		Open
REFERRALS	⊘ In Progress		These records are currently being processed by	the OH learn		
Anagement Referral						

Where a user has saved but not submitted a referral, they can locate the Referral in the 'Pending' section.

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Data Viewer	Active Management Referrals by Statu	28		Active Management Referrals (1)		Norta	See more
				Status OH In Progress - Initial Consultation Adam	syeet s Adams	Treped 27/02/2020	🕼 Ория
Surveillance Programmes				My Tasks		Search Tests	See more
				Recent		Priorite	
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				New task the	Medium		· · ·
				New task description			
							-
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Data Viewer	⊘ Pending		You have not yet issued these records to the OH test	im for review		0
HEALTH SURVEILLANCE	Created	Employee Name		Referral Type		Actions
Surveillance Programmes	27/02/2020 0 days 2 hours ago	Peter Parker		Fitness For Work		Open
REFERRALS	O In Progress		These records are currently being processed by	the OH team		0

Within the case, there is a function **Referral Activity**. Users can update the Occupational Health team with any information or request updates in here. The Occupational Health team will respond to any queries and provide updates using this also. To identify where a user has a new message, check the message icon at the top of the screen. Where there are unread messages, there will be a red circle with a number. The number will be how many unread messages there are.



Should the OH&WB Team require any further information before triage can be completed, the managing referrer will receive an email. This will notify them that further information is required and to log into the system. Once logged in, go to the message bubble. These messages have the title **Awaiting Further Information.** Click on the message and this will take the user to the case.



Review what information is required in the **Further Information** section. The response can then be typed into the free type box, or any documents can be added by drag and drop or browse for files. Users can save if further information is not fully available or **Re-Submit to OH**. The case will wait in the **Management Referral Dashboard** under section **Requires Further Information**. UKIM OH&WB team cannot proceed with the case until **Re-Submit to OH** has been selected.



Classification: External