

# 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: [wellbeing@ukindmed.com](mailto:wellbeing@ukindmed.com) 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.

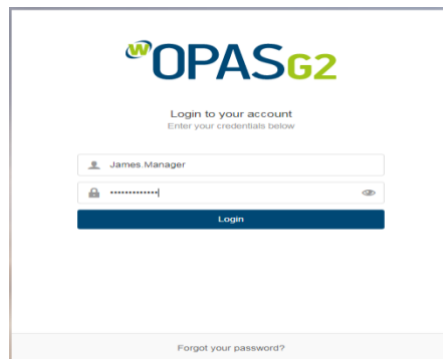
Civica are ISO 27001 certified and are Cyber Essentials accredited.

# OPAS Management Referral

## GETTING STARTED

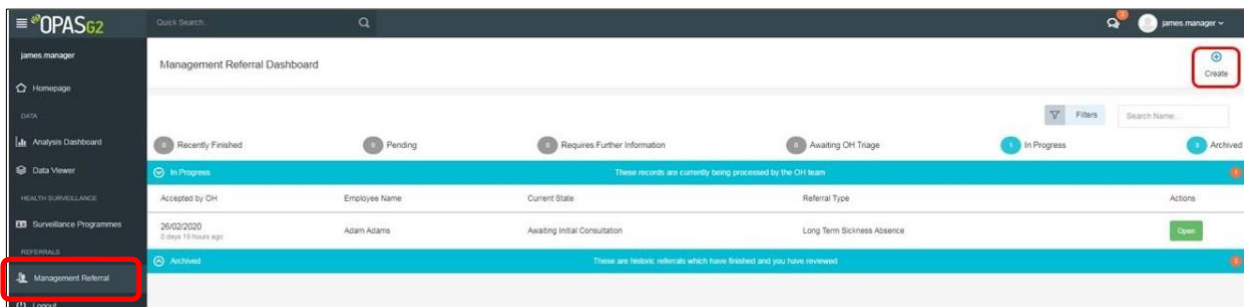
When accessing the portal for the first time users will receive an email from [noreply@opasg2.com](mailto:noreply@opasg2.com) with a link to reset the password for access.

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.



## 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:



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

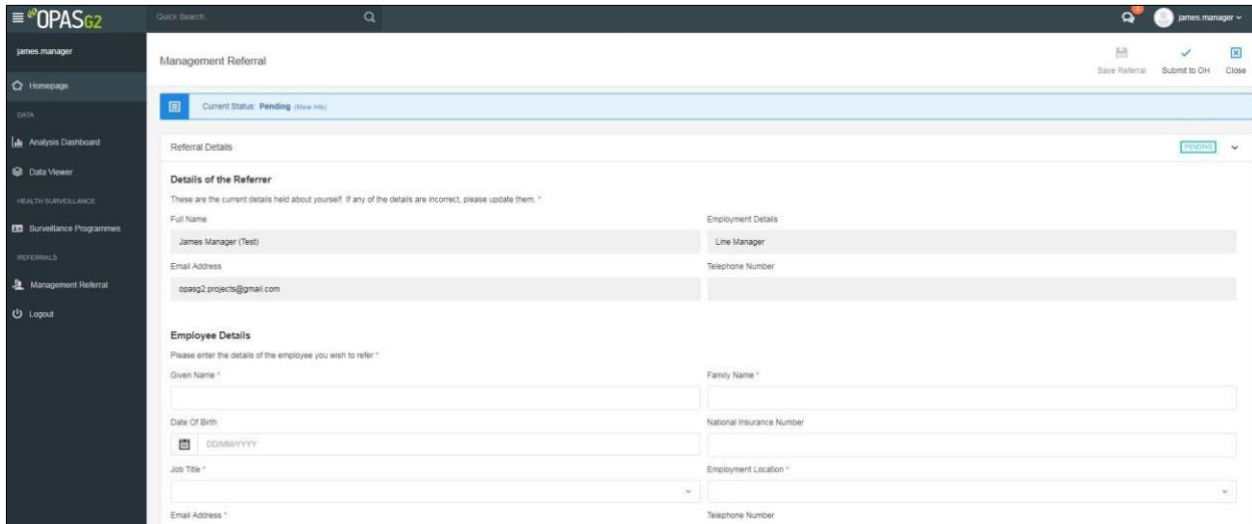
### Additional Contributors

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.

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			



## Entering Employee Details

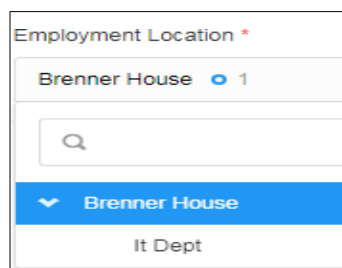
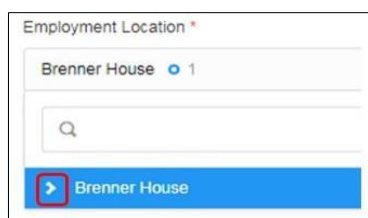
Start by free typing the employee name into the **Given Name (first name)** and **Family Name (surname)** which will prompt the system to provide a list of names used previously as a short cut thus allowing users to select the name if it is already in the list. If the employee is not already in the system,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



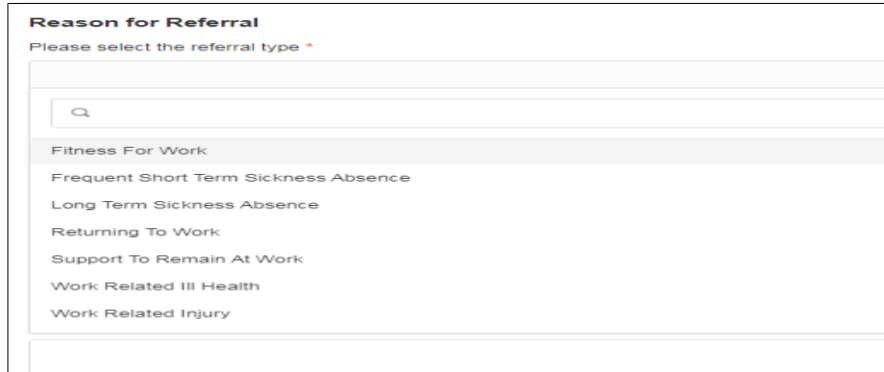
Always enter the employees email address, contact number (preferably not their work number) and home address into the fields provided.

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

# OPAS Management Referral

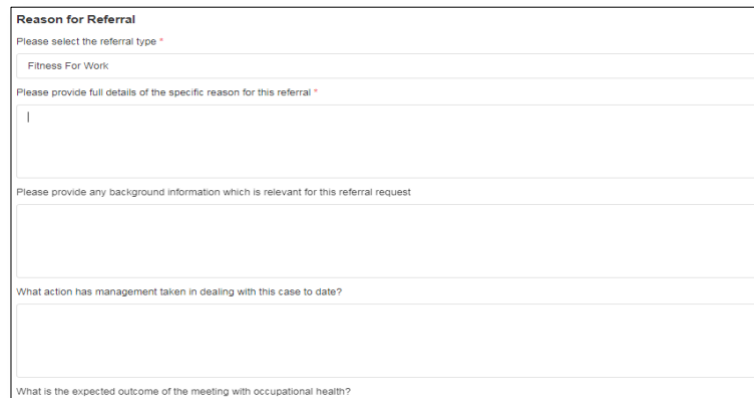
## Capturing the Reason for Referral:

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



The screenshot shows a dropdown menu titled "Reason for Referral" with the instruction "Please select the referral type \*". A search bar is visible at the top. The list of options includes: Fitness For Work, Frequent Short Term Sickness Absence, Long Term Sickness Absence, Returning To Work, Support To Remain At Work, Work Related Ill Health, and Work Related Injury.

Complete all mandatory 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.



The screenshot shows the "Reason for Referral" form. It includes a dropdown menu for "Reason for Referral" (selected as "Fitness For Work"), a text area for "Please provide full details of the specific reason for this referral \*", a text area for "Please provide any background information which is relevant for this referral request", a text area for "What action has management taken in dealing with this case to date?", and a text area for "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:



The screenshot shows the "Working Environment" form with two text areas: "Details of their normal duties and any physical demands within their job" and "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.

If the absence is a result of an **Accident at Work or Work Related Ill 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.

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

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.

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

HSE Approved Health Surveillance required

Yes  No

Other

Yes  No

Briefly describe the Employee's work duties:

## 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 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







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 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 or [Browse for files](#)

3 documents uploaded

 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 & Wellbeing and understands that an occupational health report will be sent back to you, the employer, with their consent advising you about how you might be able to help him/her from a work perspective taking into account the employee's current health problems/symptoms/underlying condition(s) \*

Yes No

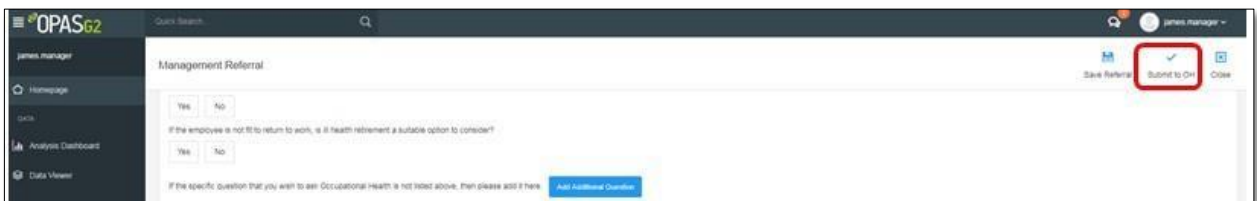
Do you confirm that the employee consents to UKIM Occupational Health & Wellbeing retaining relevant personal and health information as required in order to process this referral and that they understand their rights under the Data Protection Act (further information can be found at [www.ico.org.uk](http://www.ico.org.uk)) \*

Yes No

Do you confirm that the employee consents to the consultation taking place and that the content of the Occupational health report will be discussed and agreed with him/her during the consultation with the UKIM Occupational Health professional \*

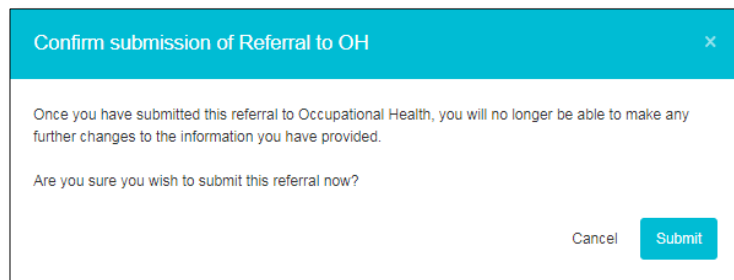
Yes No

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

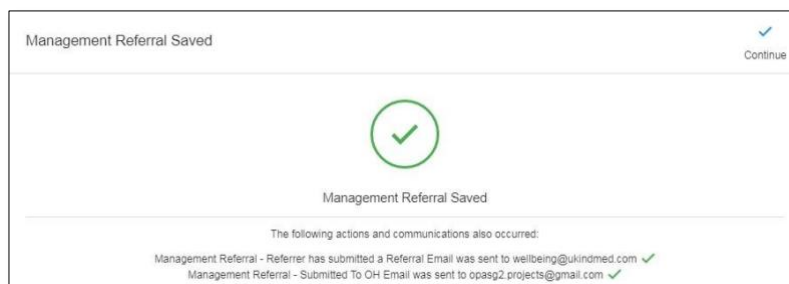


On submission, any mandatory fields that have not been completed will be highlighted. Users will not be able to complete submission until such fields have been completed.

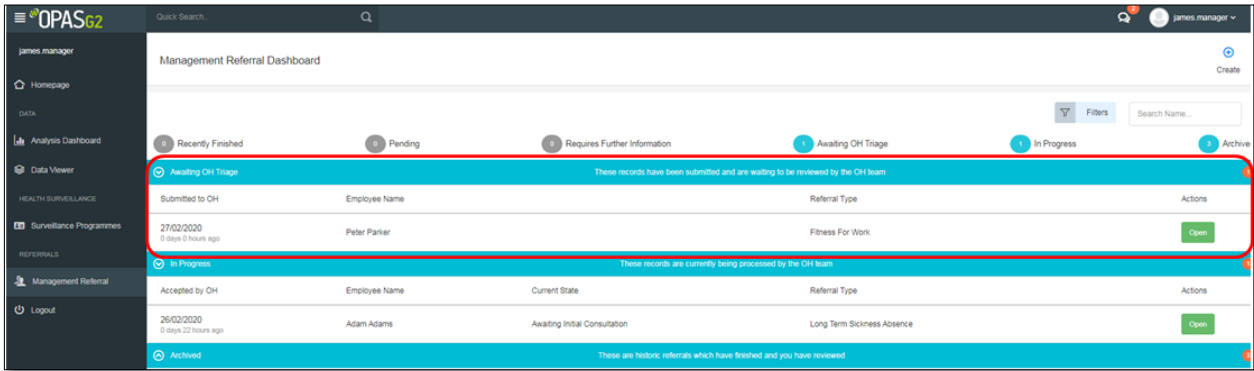
Users will be asked if to confirm before submission will be complete, there is an option to choose **Cancel** to continue to make any changes to the Referral.



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

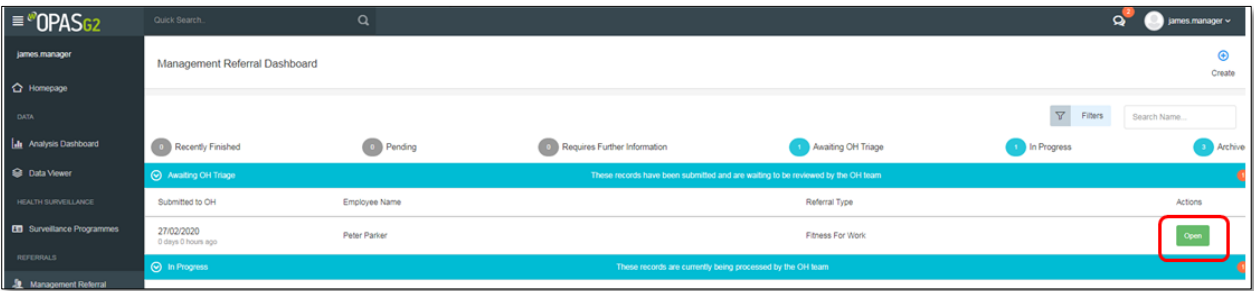


Once the message is closed the **Management Referral Dashboard** will appear and the Referral should be displayed under the **Awaiting OH Triage** section.

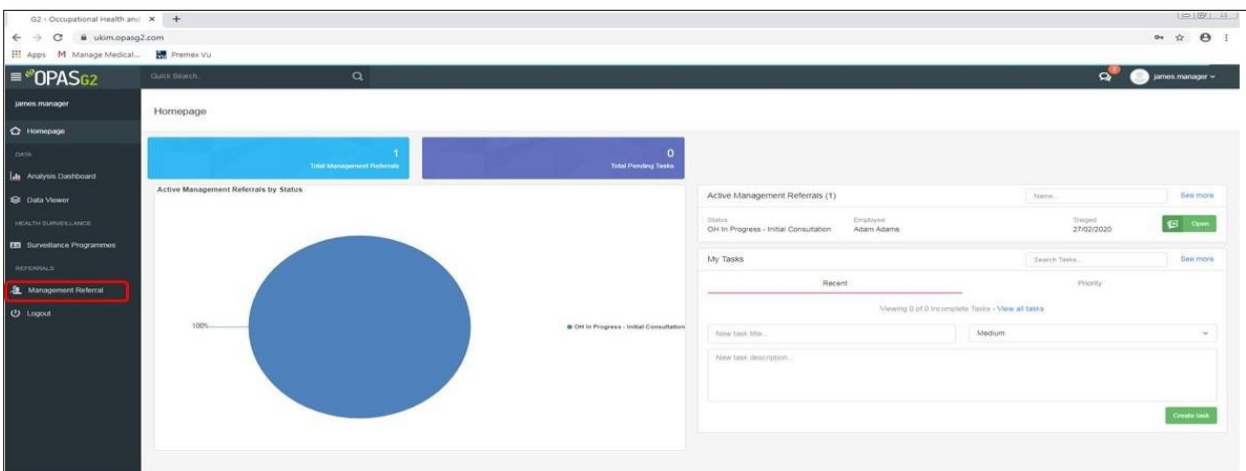


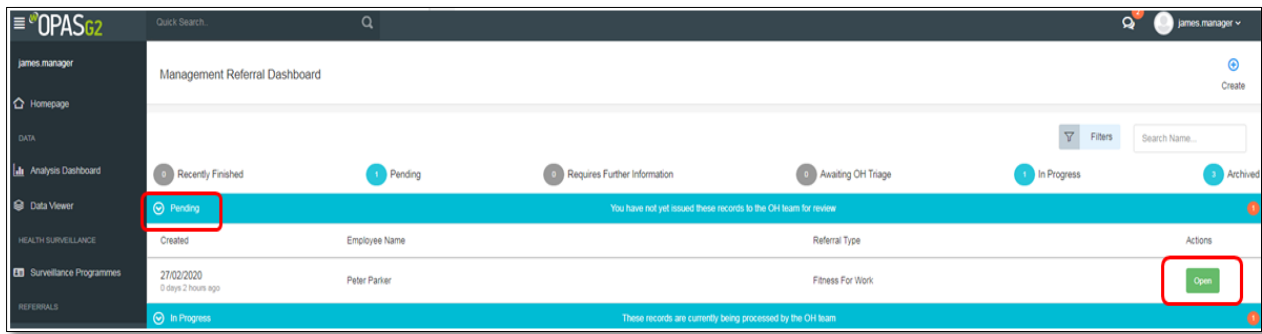
## GENERAL NOTES AND FEATURES

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:

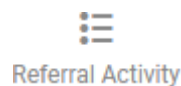


Where a user has saved but not submitted a referral, they can locate the Referral in the 'Pending' section.

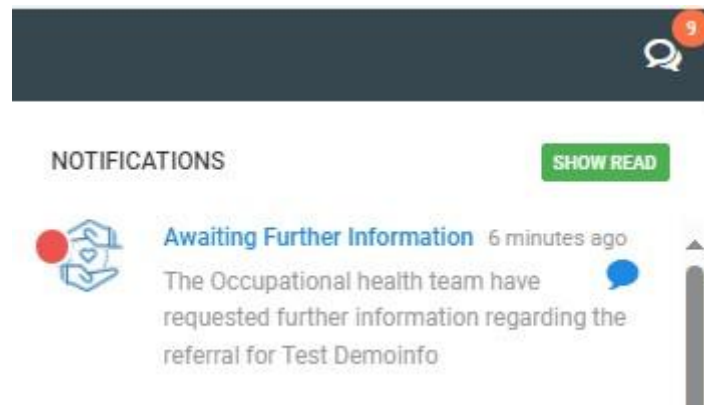




Within the case, there is a function **Referral Activity**. Users can update the Occupational Health team with any information or request updates in here. The Occupational Health team will respond to any queries and provide updates using this also. To identify where a user has a new message, check the 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.

