

# Creating a Referral

This Quick Reference Guide provides a step by step guide to creating a referral for an employee. For ease this guide will focus on a Performance and Attendance Management referral. Other referral types may vary slightly.

1. Log in using your **Username** and **Password**
2. Landing page gives you a quick link to **Create a New Referral**
3. Another way to create a new referral would be to select **Actions** and then **Create a New Referral** from the options in this tab
4. Select the relevant **Service Line** and **Next**
5. Select the **Service** and **Next**
6. Search for an **Employee** if they have previously been referred or **Next** to create new employee



7. Complete the **Employee Details**
  - Fields with a **Red Asterisk** are **Mandatory** \*
  - Easy address match – enter the **Postcode** and select **Search**, then select **Next**
8. Add **Booking Notes** to provide information about appointment availability and select **Next**

You can add any booking notes here for the case, if you wish.

Add any booking notes here

9. **Primary Referring Manager** will be pre-populated
10. Select **Yes** to add an additional manager and enter email address
11. **Absence Status**
  - Select **Referral Condition/s**
  - N.B. You can select as many conditions as necessary
  - Select **Reason for Referral** from drop down menu
  - If the employee is **Currently Absent**, you will need to enter the first day of current absence
  - If the employee has a **Recurrent/Short Term Absence**, you will need to indicate if employee is currently absent and provide details of historical or recurrent absences
  -
12. **Background and History**
  - Select **Option** and enter **Comments**

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13. Select **Current Duties** (use the **Ctrl Key** to select more than one)

14. **Upload Documents**

- Select **Add New Document**
- Select **Choose File** and select the file
- Select **Document Type** and **File Type**
- 

15. **Other Health Related Questions**

- N.B. The outcome report will always include an opinion on the topics listed
- Select **Add Questions**, here the manager can add up to three questions to support the referral
- 

16. **Special Instructions**

- Select **Any Special Requirements** to be taken into consideration
- 

17. **Consent**

- Read the **Consent Criteria**
- Select **I Agree**, if you have addressed all points
- Select **Next**
- 

18. If the requested service requires approval, **Finance Details** may need to be provided

- Select **Business Unit**
- Select **Available Payer**
- Select **Next**

19. **Referral Summary**

- Check the referral details
- Select **Create Referral**
- Note down the **Referral ID**
- Select **Finish**

**Background and History**

Are there any workplace matters which may require consideration by the OH practitioner?

Yes  No  Don't Know

Comment \*

**Current Duties**

Please select current duties \*

Climbing

Computer/Display screen equipment work

Driving

Handling food

Manual handling & lifting

Upload Document(s)

Document	Document Type	File Type
No document available		

[Add New Document](#)

**Other Health Related Questions**

The outcome summary report will always include: advice on the he duties is unlikely, advice on modifications to allow continued, empl

Please specify any additional questions you have

Question

An additional question not covered in standard reporting

[Add Questions](#)

**Special Instruction(s)**

Please tell us about any special requirements that may need to be taken into con

Access Difficulties (e.g. wheelchair user)

Hearing Impairment (e.g. requires a signer to be present)

Speech or language barrier (e.g. requires a translator)

Learning Difficulties (e.g. unable to communicate effectively without a companion)

Other communication issues (e.g. phobia of using telephone)

**Consent**

- I confirm that I have discussed the reasons for referral with Mr Paul Trai
- I confirm that I have discussed possible outcomes with Mr Paul Trainer.
- I confirm that Mr Paul Trainer agrees to attend an Occupational Health (
- I confirm that Mr Paul Trainer agrees to an outcome report being written
- I confirm that Mr Paul Trainer understands that their details may be prov
- I understand that the information I provide may be disclosed to Mr Paul

I agree

**Business Unit and Payer**

Business Unit \*

Krakow

20. **Draft Referrals**

A referral can be saved as a draft at any stage

[Save as Draft](#)

The referral will be saved in **Tasks** from where it can be progressed at a later date

[Tasks \(1\)](#)