



# OPAS-G2 Occupational Health Management Software User Guide

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## OPAS-G2 Occupational Health Management Software User Guide

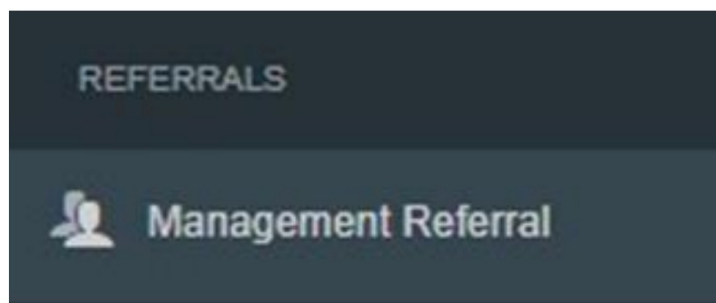


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## Creating a Referral

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'** seen below

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)

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**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.

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.



### Employee Details

Please enter the details of the employee you wish to refer \*

Given Name \*

Family Name \*

Date Of Birth

National Insurance Number

Job Title \*

Employment Location \*

Email Address \*

Telephone Number

Home Address

### 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 and Specifications.

Finally complete the '**Advice required from Occupational Health**', attach any required documents and complete the declarations

### 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?

Would any adjustments and/or restrictions to the employee's working environment be appropriate to improve their ability to fulfil their current role?

What are the expected timescales for the employee regaining fitness for work?

Does the employee have any long term underlying health condition(s) which affect their fitness for work?

Does the Equality Act 2010 (previously the Disability Discrimination Act) apply to this employee?

If the employee is not fit to return to work, is ill health retirement a suitable option to consider?

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.

Next the manager must confirm that they have or don't have the employee consent.

**(Before referring you must gain consent)**

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

Yes

No

Once all section are complete select 'Submit & Request Consent' from the top right

**(You can save the referral at any point using the save icon here. However Occupational Health will not have sight of the referral until you submit it.)**



Save Referral



Submit & request consent



Close

A notification will show an email has been sent to the employee to gain consent.



Management Referral Saved

 Continue



Management Referral Saved

The following actions and communications also occurred:

 Management Referral - Pre-Consent Requested was sent to g2test2@hotmail.com 

In the Management Referral Dashboard, the referral will now be masked 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	

The employee will now receive an email asking for their consent

## Management Referral Dashboard

Management Referral Dashboard Create

Filters

Search Name...

Recently Finished

Pending

Requires Further Information

Awaiting OH Triage

In Progress

Awaiting Consent

Awaiting Pre-Consent

Employee Pre-Contested

Archived

Recently Finished

These records have recently been finished by the OH team and are ready for you to review

Completed	Status	Employee Name	Referral Type	Actions
25/07/2021 197 days 12 hours ago	Complete	Jayce Noric	Long Term Sickness Absence	<a href="#">Open</a>
23/08/2021 168 days 23 hours ago	Complete	Virgil Rayben	Frequent Short Term Sickness Absence	<a href="#">Open</a>
29/11/2021 71 days 2 hours ago	Complete	Danica Longstone	Returning To Work	<a href="#">Open</a>
16/12/2021 53 days 11 hours ago	Complete	Linda Brem	Long Term Sickness Absence	<a href="#">Open</a>

In Progress

These records are currently being processed by the OH team

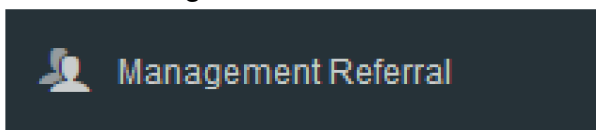
Accepted by OH	Employee Name	Current State	Referral Type	Actions
21/12/2021 49 days 8 hours ago	Alexia Rosselerin	Ongoing	Work Related Ill Health	<a href="#">Open</a>
22/12/2021 47 days 11 hours ago	Norbert Redmore	Awaiting Initial Consultation	Long Term Sickness Absence	<a href="#">Open</a>
03/01/2022 35 days 15 hours ago	Josiah Springham	Ongoing	Frequent Short Term Sickness Absence	<a href="#">Open</a>
10/01/2022 28 days 12 hours ago	Wm Bolgard	Awaiting Initial Consultation	Fitness For Work	<a href="#">Open</a>

As the referral is progressed by the Occupational Health team the status of the referral will be update in real time.  
**(You will not be able to see any clinical information, but you will be able to see a timeline of events.)**

## Receiving a response from the Occupational Health Team

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.

Click on **'Management Referrals'** on the left hand side



From the dashboard select to **'Open'** the corresponding referral. This will be under the **'Recently Completed'** tab.

Actions

[Open](#)

The timeline will show the referral is completed.

Additional Information

Referral Activity

Documents (0)

Communications

Send Message

<div> <div> </div> <div> Sun 18th Jul 2021 16:23 </div> </div>	<div> Employee gave consent for their manager to see the OH advice </div> <div> Brendon Winneconnett (CS105132) </div>
<div> <div> </div> <div> Fri 16th Jul 2021 04:27 </div> </div>	<div> Employee consent requested </div> <div> Rebecca Hyden (CS10026) </div>
<div> <div> </div> <div> Wed 7th Jul 2021 03:07 </div> </div>	<div> Employee Details Validated </div> <div> Rebecca Hyden (CS10026) </div>
<div> <div> </div> <div> Mon 5th Jul 2021 23:58 </div> </div>	<div> Submitted To OH </div> <div> Maximiliano Sandhurst (CS105743) </div>

The main body of the page will display the original referral and an Occupational health advice section.

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

The Occupational Health Team will have answered the question you requested, providing any further relevant information.

OH Advice

COMPLETE

Is the employee medically fit for their current role?

The employee is fit to continue with their normal duties

Please provide any other recommendations and/or advice regarding this referral which has not been covered elsewhere?

And detailed any adjustments required

## Referral Outcome

Outcome

Fit

Details of any required Adjustments and/or Restrictions

Adjustment / Restriction	Details
No adjustments or restrictions entered	

## Interim Updates

If the Occupational Health Team wish to carry out further appointments regarding a referral they can provide an interim update. **(The same process as above will apply.)**

An email will be received confirming a response has been provided.

OPAS-G2

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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OPASG2

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

In Progress <span>These records are currently being processed by the OH team</span> <span>10</span>				
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	<a href="#">Open</a>
08/02/2022 0 days 0 hours ago	Samantha Sandwel	Awaiting Initial Consultation	Returning To Work	<a href="#">Open</a>
08/02/2022 0 days 0 hours ago	Heath Woodson	Ongoing with Interim Update 	Fitness For Work	<a href="#">Open</a>

The interim updates will have the current state of **'Ongoing with Interim Update'** and will have a flag next to it.

Click **'Open'**

This provides the same information as the Occupational Health Advice detailed above but as an Interim report.

The referral is ongoing and the Occupational Health Team may yet have further consultations or action with the employee.

**Documents / Resources**

<div>OPAS-G2</div> <div>Referring Managers</div> <div>Guide</div> <div>V1</div>	<div><a href="#">Software OPAS-G2 Occupational Health Management Software</a> [pdf] User Guide</div> <div>OPAS-G2 Occupational Health Management Software</div>
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Manuals+.