

How to use Cority for Occupational Health Referrals

This document is to be used as a guide for the referring managers. It will allow the manager to create a new referral, track the progress and receive the response from the Occupational Health Team.

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1. Logging On

Following receipt of log in details from Occupational Health, the system can be accessed via the following link <https://sthhs.my.cority.com>

2. Forgotten password

You can reset your password using the **Forgot Password?** link

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3. How to add a new referral

Click on the relevant management referral questionnaire for your organisation.

Complete the form with all the relevant information, any field marked with * is mandatory and you will not be able to submit the referral until all these fields have been completed.

Employee First Name & Employee Last Name – the staff member who you are referring.

Employee Date of Birth – please enter the correct date of birth

Supervisor – this will auto populate with your details

Employer – start typing the employer name or click on the search box on the right

Post Title – start typing the post title or click on the search box on the right

Employee Address – the home address of the employee

Employee email – the email address where the appointment notifications will be sent to

Background for the referral – free text area

HR contact – if a copy of the report needs to be available for a HR colleague. Click on the magnifying glass icon and type the surname of the HR contact you wish to add

Reason For Referral – click on the magnifying glass and select from the list

The screenshot shows a web interface for adding a new referral. On the left is a navigation menu with options: Home, My Dashboards, My Tasks, My Resources, My Records, and Near Me. The main content area is titled 'Management Referral STH June 23' and includes buttons for 'Cancel', 'Delete', 'Save', and 'Submit'. Below the title is a 'Details' section with a red warning message: 'THE PROCESS TO SUBMIT A REFERRAL HAS RECENTLY CHANGED. PLEASE COMPLETE THE DETAILS BELOW AND SUBMIT THIS REFERRAL WILL NOT APPEAR IN "MY RECORDS" UNTIL OCCUPATIONAL HEALTH HAVE RECEIVED AND VALIDATED IT'. The form fields are: 'Employee First Name *' (text input, 0/50), 'Employee Last Name *' (text input, 0/50), 'Employee Date Of Birth *' (date picker, dd/MM/yyyy, 00/MM/YYYY), 'Supervisor' (pre-filled with 'Lyne, MR Theresa (E196052)'), 'Employer *' (search input, 'Search for...'), and 'Post Title *' (search input, 'Search for...').

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Tick only the questions that you would like answering by the Occupational Health Clinician.

There is also a free text box for any additional questions required.

Click on the I AGREE box to indicate that you have involved the employee in the referral process.

Please ensure that you notify the employee if the referral is being actioned by a different user to the manager (eg if a secretary makes the referral, their user name will show as the referring manager), and a copy of the referral form is shared with the employee. This is the statement you are agreeing to when submitting the referral.

Once the form is complete, select Save or Submit from the top right-hand corner.

Save – this will save the form and allow you to return and update it prior to it being received by OH. This will be located in My Tasks > Incomplete

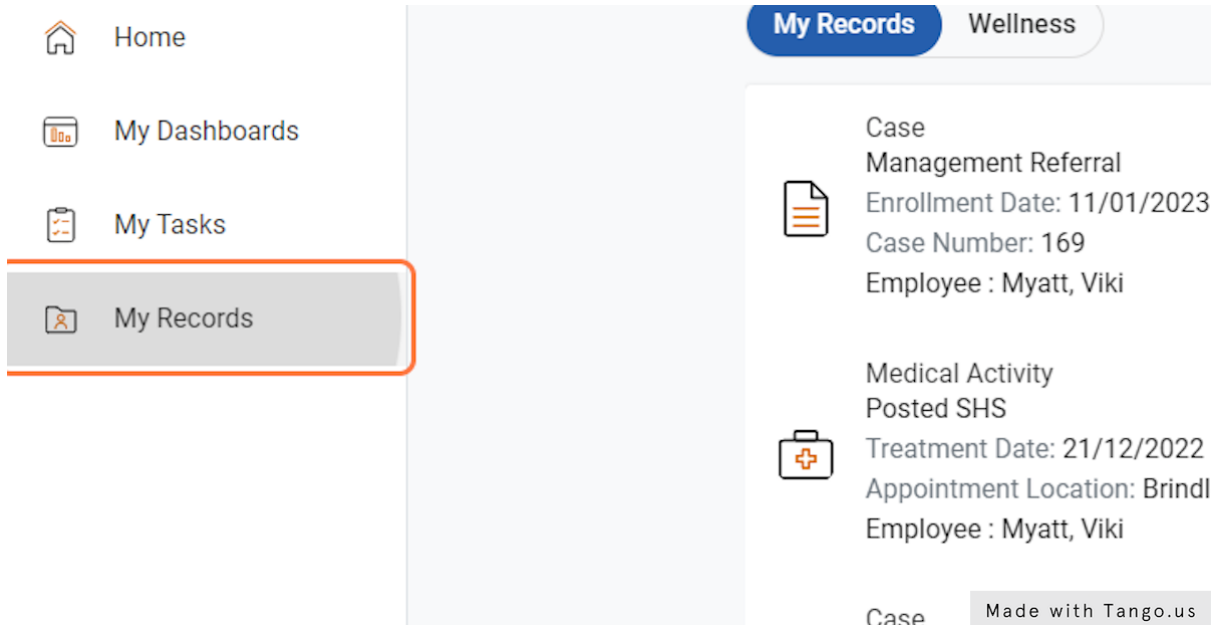
You may need to remove any filters to see the incomplete referral

The OH team WILL NOT see this form until it has been submitted.

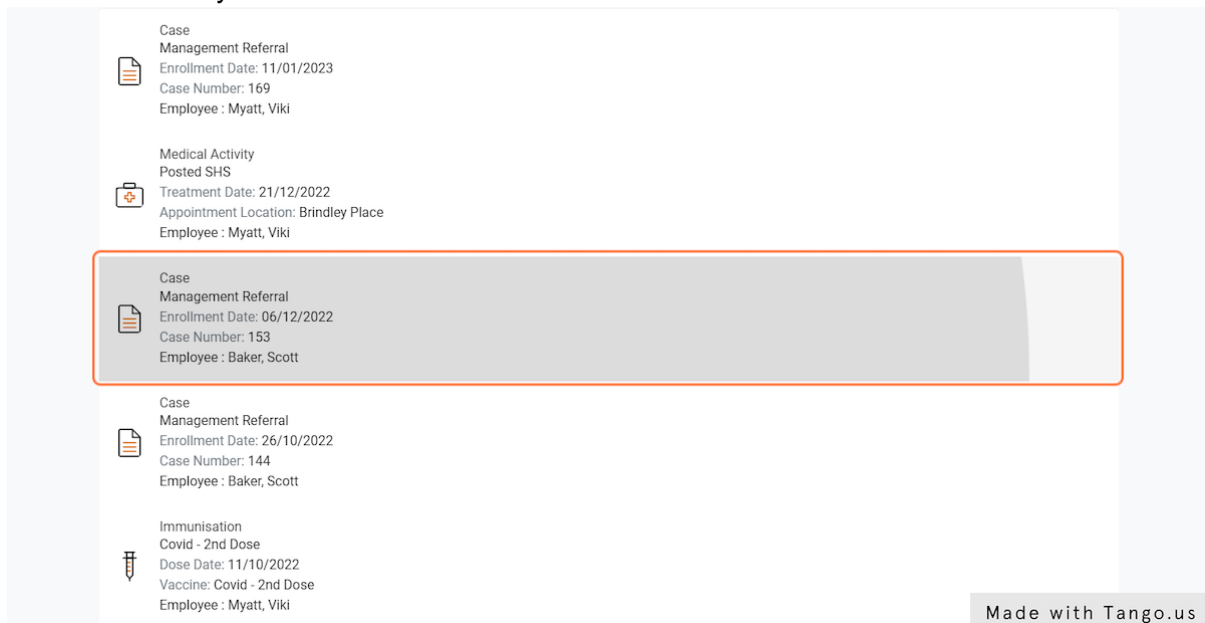
Submit – Submit will send the completed form to OH and can no longer be updated by the manager.

4. How to view updates/responses

When updates are made, you will receive notification via email, and will be able to view your referrals in “My Records”



Select the case you wish to view



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The Case page will show the status of the referral

Myatt, Victoria (vmyatt)

Management Referral

<input checked="" type="checkbox"/> Share with Supervisor	Supervisor Myatt, Viki (888888)
Manager Name	HR Manager Rees, Dominic (DRees_HR)
Referral Reason Long Term Sickness Absence (02)	Case Referred By Group Manager (03)
Referred Date 26/10/2022 DD/MM/YYYY	Date Received 26/10/2022 DD/MM/YYYY
Date Triaged 26/10/2022 DD/MM/YYYY	First Offered Date 28/10/2022 DD/MM/YYYY
First Attended Date 28/10/2022 DD/MM/YYYY	First Report Issued Date
Date Closed	Opinion

Record 4 of 29

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The Questionnaire tab will show the original questionnaire and any responses/reports issued by OH. Select the questionnaire/report name you wish to view

myCase

Case **Questionnaires** Messages

Questionnaires

Case Questionnaires

<input type="checkbox"/> Date Completed	Questionnaire
<input type="checkbox"/> 26/10/2022	Management Referral
<input type="checkbox"/> 26/10/2022	Management Referral Response

Items per page 20 1 - 2 of 2

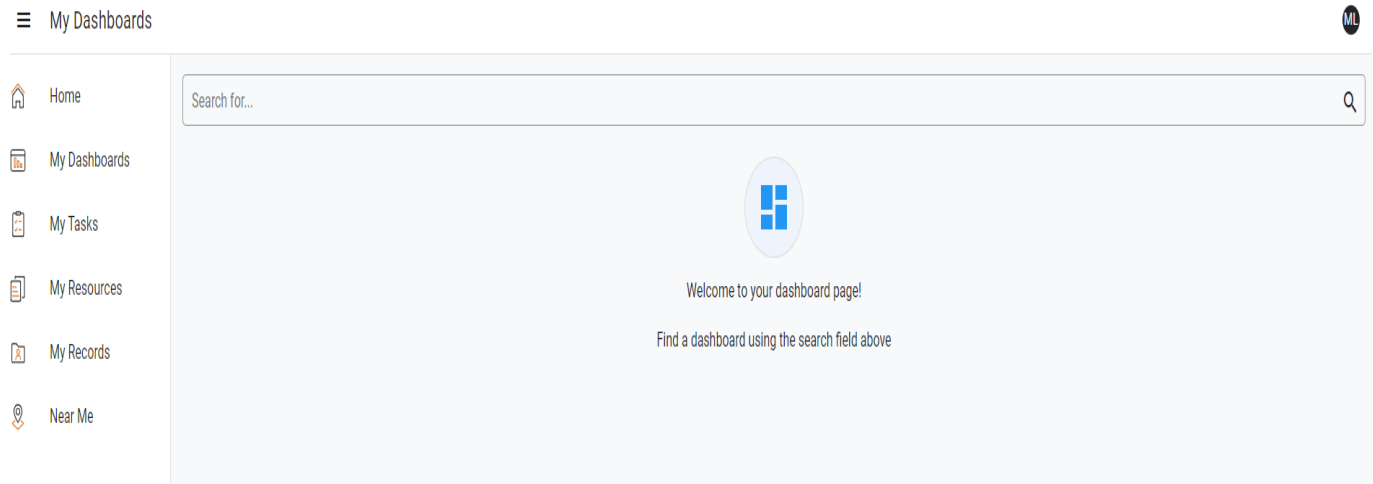
Record 4 of 29

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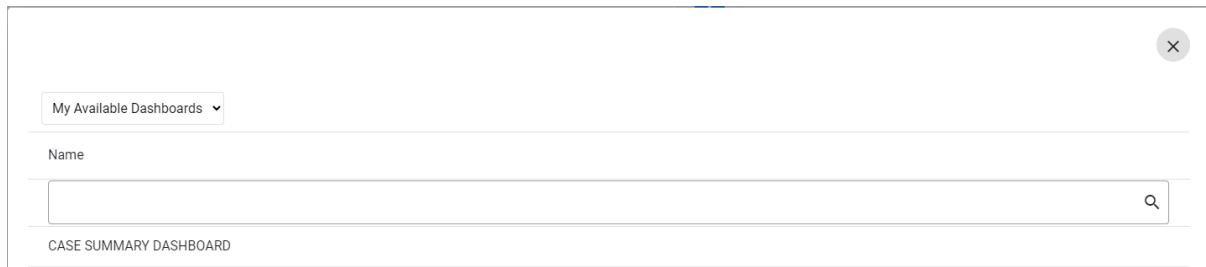
5. How to view appointments

To view the appointment dates/times and status, from the left hand menu, click on My Dashboards

In the Search bar, click on the magnifying glass icon:



Click on CASE SUMMARY DASHBOARD



You will then see a list of all appointments for the referrals you have made. You can expand the screen by using the square icon to the right hand side of the dashboard:

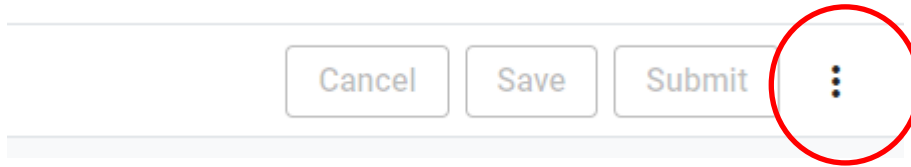
Case Summary Dashboard



Once expanded, you will need to click the 'x' to return to the main MyCority screen

6. How to print out the referral questionnaire or report

From the referral or report, click on the icon as highlighted below



Click on the drop down box which shows "Print or Export"

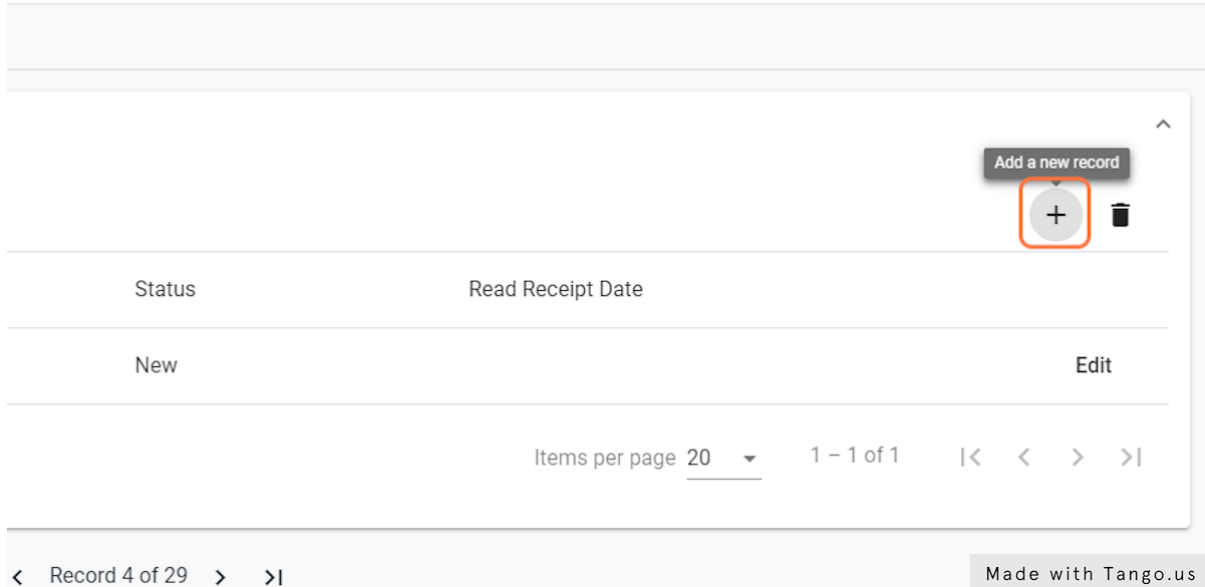
This will open the screen to show two buttons; "Print" and "Export to PDF". Choose as relevant.



Once you have completed this, click on the "x" which will take you back to previous page.

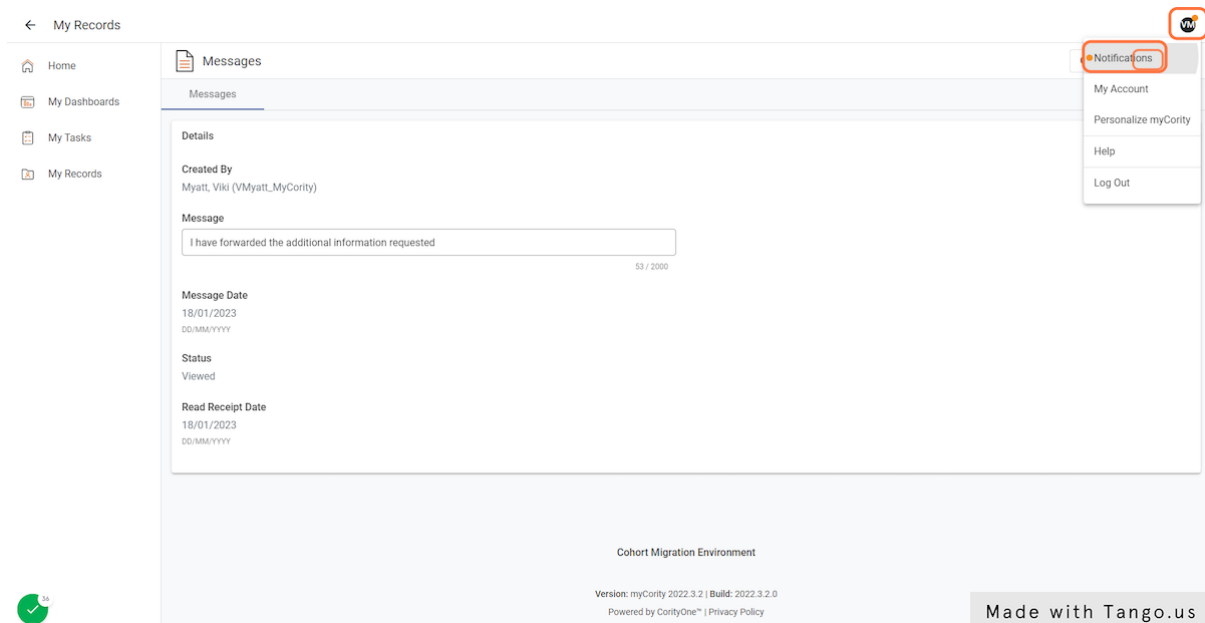
7. How to send a message to OH, or receive a message from OH

Select the messages tab. To add a message, select the + in the top right hand corner



Enter your message and click on Save.

When you receive a message or update to a referrals, along with an email you will see an orange dot on your initial in the top right hand corner. Open the menu and select Notifications



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Click on the notification you wish to view

The screenshot shows a list of five notifications. The first notification is highlighted with a red border. Each notification includes a title, a message, a date, and a 'GO TO RECORD' link. A close button (X) is located in the top right corner of each notification card.

Case ID	Message	Date	Action
Case 144	Thank you	18/01/2023	GO TO RECORD
Case 153	Appointment is pending	21/12/2022	GO TO RECORD
Case 102	Please can you provide the sickness absence report	11/08/2022	GO TO RECORD
Case 102	Is the employee currently off work?	11/08/2022	GO TO RECORD
Case 112	Please can you provide Sickness Report	21/07/2022	GO TO RECORD

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