

Sheffield Occupational Health Service

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 <u>https://sthnhs.my.cority.com</u>

2. Forgotten password

You can reset your password using the Forgot Password? link



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

÷	My Tasks					•
ດ	Home	Management Referral STH June 23		Cancel Delete	Save Submit	: j
5	My Dashboards	Details		^		
	My Tasks	THE PROCESS TO SUBMIT A REF	FERRAL HAS RECENTLY CHANGED. PLEASE COMPLETE THE DETAILS BELOW AND SUBMIT			
Ì	My Resources	THIS REFERRAL WILL NOT APPE Employee First Name *	EAR IN "MY RECORDS" UNTIL OCCUPATIONAL HEALTH HAVE RECEIVED AND VALIDATED IT			
	My Records					
8	Near Me	Employee Last Name *		0 / 50		
				0750		
		PLEASE ENSURE YOU INPUT THE Employee Date Of Birth *	E CORRECT DATE OF BIRTH OTHERWISE THERE MAY BE A DELAY IN VALIDATING THE REFERRAL			
		dd/MM/yyyy		Ö		
		DD/MM/YYYY				
		Supervisor Lyne, MR Theresa (E196052)				
		Employer*				
		Search for		=		
		Post Title *				
		Search for		٩		

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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



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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.

÷	My Tasks							
ត	Home	Se Management Re	ferral STH June 23	Cancel	Delete	Save	Submit	1
	My Dashboards		Please select which questions you would like answering by the Occupational Health Clinician					
	My Tasks							
ŋ	My Resources		Please comment on the employee's ability, on health grounds, to undertake their usual work role and identify any recommendations (i.e. work adjustration and timescales	nents/re	estrictions)			
	My Records		Are there any underlying health condition(s) that may affect the employee's attendance or performance?					
8	Near Me		Is this ampleuse markedly fit to work in this role? If not please rive timescales for their return or recommendations for alternative durins (if applicable)	(e)				
			The rule outlood on the region of the rule	~)				
			Are there any adjustments that could be considered to achieve an improvement in the employee's attendance or that could support an earlier return to	o work?				
			Is the employee's health condition or absence caused by or exacerbated by their role?					
			Does the employee's health condition(s) have a substantial and/or long term effect on their ability to carry out normal day to day activities in relation please advise on any support and/or adjustments that could be put in place to assist the employee at work. Yes	to work	? If so,			
			Could the employee's health condition(s) be classed as a disability as defined within the Equality Act?					
			Additional questions can be asked in relation to supporting the employee in remaining or returning to work in the text box provided					
					0 / 4000			

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.



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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"

G	Home			My Re	cords	Wellness	
000	My Das	shboards			Case Manage	ment Referral	
,	My Tas	sks			Enrollme Case Nu	ent Date: 11/0 Imber: 169	1/2023
R	My Rec	cords			Employe	e : Myatt, Vik	İ
			,	4	Medical Posted S Treatme Appointr Employe	Activity SHS ent Date: 21/1 ment Location ee : Myatt, Vik	2/2022 n: Brindl i
					Case	Made with Ta	ango.us
Select	the case	e you wish to vie	W				
	Case Mana Enroll Case Emplo	gement Referral ment Date: 11/01/2023 Number: 169 yee : Myatt, Viki					
	Medic Poste Treatr Appoi Emplo	al Activity d SHS ment Date: 21/12/2022 ntment Location: Brindley Place yee : Myatt, Viki					
	Case Mana Enroll Case Emplo	gement Referral ment Date: 06/12/2022 Number: 153 oyee : Baker, Scott					

Case Management Referral Enrollment Date: 26/10/2022 Case Number: 144 Employee : Baker, Scott

> Immunisation Covid - 2nd Dose

Dose Date: 11/10/2022 Vaccine: Covid - 2nd Dose Employee : Myatt, Viki

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The Case page will show the status of the referral

Management Referral		~
Share with Supervisor	Supervisor	
	Myatt, Viki (888888)	
Manager Name	HR Manager	
	Rees, Dominic (DRees_HR)	
Referral Reason	Case Referred By Group	
Long Term Sickness Absence (02)	Manager (03)	
Referred Date	Date Received	
26/10/2022	26/10/2022	
DD/MM/YYYYY	DD/MM/YYYY	
Date Triaged	First Offered Date	
26/10/2022	28/10/2022	
DD/MM/YYYY	DD/MM/YYYY	
First Attended Date	First Report Issued Date	
28/10/2022		
DD/MM/YYYY		
Date Closed	Opinion	
	I < < Record 4 of 29 > >I	
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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 👻	
Date Completed	Questionnaire
26/10/2022	Management Referral
26/10/2022	Management Referral Response
	Items per page 20 1 − 2 of 2 < < > >
I¢ ¢ Record 4	i of 29 > >1
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Management Referral User Guide – August 2024



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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:

Ξ	My Dashboards	
â	Home	Search for
<u>It</u>	My Dashboards	
.	My Tasks	
	My Resources	Welcome to your dashboard page!
2	My Records	Find a dashboard using the search field above
8	Near Me	

Click on CASE SUMMARY DASHBOARD

	×
My Available Dashboards 🐱	
Name	
	Q
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

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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.

Print	Export to PDF	×

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

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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

		Add a new record
Status	Read Receipt Date	
New		Edit
	ltems per page 20 → 1 – 1 of 1	I< < > >I
Kecord 4 of 29 > >I		Made with Tango.us

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

←	My Records			٢
â	Home	Messages	Notifications	
1.	My Dashboards	Messages	My Account	
Ē	My Tasks	Details	Personalize myCo	rity
		Cranted By	Help	
	My Records	Myatt, Viki (VMyatt_MyCority)	Log Out	
		Message		_
		I have forwarded the additional information requested		
		53 / 2000		
		Message Date 18/01/2023		
		DOJMM/YYYY		
		Status		
		Pand Bandit Data		
		18/01/2023		
		DOJAMAYYYY		
				_
		Cohort Migration Environment		
	36	Version: myContly 2022.3.2 (Build: 2022.3.2.0	4 h . T	
Ľ		Powered by ContryOne" Privacy Policy Made WI	th lango.	us



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Click on the notification you wish to view

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