OHIO Client User Guide

CLIENT USER GUIDE to OHIO

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OHIO Support Line 0845 6435331

Accessing OHIO & how to Login

OHIO is accessed on the web, address www.ohiosystems.co.uk this will take you to the landing page below.

New users should have received their temporary password by email.

If you do not have a password or have forgotten it, click on "Forgot Password", enter your email address and the system will automatically generate a new one and email it to you.

TIP : When you first log in using a temporary password the system will allow you to change your password to one of your own choosing. This password must be a minimum of 7 characters and contain at least 1 capital letter and 1 number.

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Home Page

Once you have successfully set your own password you will be taken to your HOME Page. This is the Blue Main Menu bar which provides the first level of navigation through the system and holds links to the major sections of the site.

There is also a series of shortcut buttons for making new referals.

| Home | Client Area | PAM Service | Reports | Help |

You are here: Home

New DayOne Referral | New Health Surveillance Referral | New Management Referral | New PhIL Referral | New Wellbeing Referral

Immediately underneath is the managers 'dashboard' which summarises information and provides alerts so the Referring Manager can see at a glance what is happening regarding referrals and health surveillance needs for their employees.

> Shows what Clinic dates are scheduled within 30 days & how many appointments are currently booked in.

You have 2 master appointments scheduled within the next 30 days

Show 5 records per page.

Appointment ID	Date-Time ▲	Clinic	Clinician	Duration	Referrals booked in	Action
35532	18/07/2014 09:00	Warrington Co	Pam Newton	Full Day	3	View
35533	25/07/2014 09:00	Warrington Co	Pam Newton	Full Day	0	View
						Total: 2

☐ Show All Master Appointments

> Click on view to see what time slots are available

> Health Surveillance Dashboard

⚠ You have 9 employees due assessment within the next 3 month. **View Health Surveillance Recall Report**

💡 Health Surveillance Recalls

Show 5 records per page.

Location	Employee Name	Employee Job Title	ERN	Date Of Birth	Health Surveillance Type	Status	Date Last Medical	Recall Weeks	Due Date ▲	Traffic Light	Action
Warrington Co (Dist Admin) Ltd	Hatton Gail	tba	27554	10/02/1970	FLT/Vocational Driver Medical (HS)	Outstanding		0	24/03/2014	⛔	Refer
Warrington Co (Distribution) Ltd	Seed Sidney	Warehouse Operative	3977	28/02/1961	Vision Screening HS	Outstanding	23/04/2013	0	22/04/2014	⛔	Refer
Warrington Co Ltd	Flowerpots Fifi	Gardener	27074	23/09/1972	FLT/Vocational Driver Medical (HS)	Outstanding		0	24/04/2014	⛔	Refer
Warrington Co (Distribution) Ltd	Benn Tony	driver	27566	01/01/1980	Night Workers Questionnaire	Outstanding		0	12/05/2014	⛔	Refer
Warrington Co Ltd	Mouse Micky	entertaineter	27588	01/01/1960	FLT/Vocational Driver Medical (HS)	Outstanding		0	09/06/2014	⛔	Refer
<< < 1 2 > >>											Total: 10

> Ability to refer for appointment

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OHIO Referral Statistics for your Employees - May, June and July

Submitted	In Progress	Completed
26 Management Referrals	1 Management Referrals	7 Management Referrals
19 HS Referrals	0 HS Referrals	2 HS Referrals
5 WB Referrals	5 WB Referrals	5 WB Referrals
52 PHIL Referrals	0 PHIL Referrals	0 PHIL Referrals
0 BW Referrals	2 BW Referrals	3 BW Referrals
1 Attendance Review Referrals	0 Attendance Review Referrals	1 Attendance Review Referrals

Quick Links to Add New Referrals

This page also shows :

- The names of colleagues who are due health screening, the date it is due and a simple traffic light system that highlights if they are due or overdue.
- How many Master Appointments are due within the next 30 days.
- A section on OHIO referral statistics details how many have been submitted, in progress and are completed; and the option to make a new referral.
- A section detailing how many appointments have been booked and completed.

Logging out of OHIO

To log out of OHIO, simply click the "log out" link in the top right corner of the screen

Today is Wednesday,
11 December 2013
Welcome **Gail Hatton** !
[Log Out] Change Password

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2 How Can I see what Departments I have access to?

Depending on how your organisation has been set up, referring managers can be given access to only the departments they are responsible for, or a variety of departments to cover annual leave etc.

The quickest way to see what areas you have access to is:

Go into the Client Area, then click on Clients. This will show what areas of the business you have access to.

ALTERNATIVELY

Log onto OHIO and go into the Client Area, then Employee Section.

1. Type in the managers surname and click search

2. Once you have located the correct manager, click View.

3. Click on Managed Locations tab

This will then show what areas of the business you have access to.

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3 How Can I see what Employees I have access to?

Depending on how your organisation has been set up, referring managers can be given access to only the employees they are responsible for, or a variety of employees in various departments to cover annual leave etc.

The quickest way to see what employees you have access to is:

Log onto OHIO and go into the Client Area, then Employee Section.

All the employees you have access to will be listed in alphabetical order

To view any record click on "view" on the required employee

This will take you into the Employee Details

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4 How to Search for an Employee

To see which employees you have access to, simply follow the steps below:

Log onto OHIO and go into the Client Area, then Employee Section.

The names of all the employees that are situated within the departments you have access to will be listed in alphabetical order.

This can be filtered by either by the department, or name of employee.

1. Filter by department

Or employee surname

2. Once you have located the correct employee, click View. This will present the employees record.

ERN	Status	Name	Client	DoB	Job Title	Referring Manager	Telephone	Mobile	Vaccination Date	Action
6775	Live	Allsop Stuart	Warrington Co (Dist Admin) Ltd	27/09/1967	Operative	Burman Adam	01234567890	07999999999		View Print
6784	Live	Arnold John	Warrington Co (Dist Admin) Ltd	29/08/1959	Operative	Burman Adam	01234567890	07999999999		View Print
27592	Live	Aspin Steve	Warrington Co (Dist Admin) Ltd	01/01/1970	warehouse	Mackendrick Heather				View Print
27589	Live	Ayres Pam	Warrington Co Ltd	10/01/1970	poet	Frost Jack				View Print
27553	Live	Barlow Gary	Warrington Co (Dist Admin) Ltd	01/01/1970	tba	Burman Adam	01925000000	07987654321		View Print
27115	Live	Beckham David	Warrington Co Ltd	16/02/1967	Driver	Danby Ollie	0192354			View Print
6788	Live	Bedser Alec	Warrington Co Ltd	10/12/1956	FLT Driver	Danby Ollie	01234567890	07999999999		View Print
27566	Live	Benn Tony	Warrington Co (Dist Admin) Ltd	01/01/1980	driver	Burman Adam				View Print
27130	Live	Bloggs Fred	Warrington Co (Dist Admin) Ltd	14/02/1970	FLT Driver	Burman Adam	01925000099	07777777777		View Print

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If any employee doesn't appear on this displayed list, it may be because they are located in a department you do not have access to. If this is the case, one of the designated "superusers" in your Company can reassign the employee to the correct area.

5 How to Create an Employee

The "Employees" section of OHIO is used to store all the employee records for any client. If you need to create a New Employee follow these steps

1. Select Client Area

2. Select Employees,

3. Select Add New
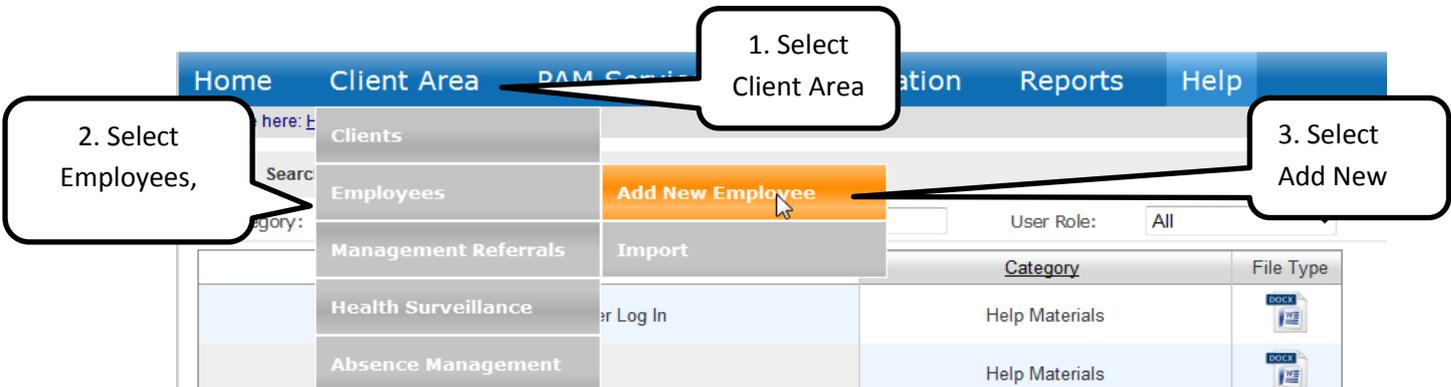
You are presented with the "Add New Employee" screen

Fill out the details of the Employee

Tip : Fields marked with * are mandatory

Do not tick this box unless the employee is to have access to OHIO

Press the "Save" button

The employee has been created.

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6 How to Create an Employee Health Surveillance Profile

In order to create an Employee HS Profile follow the steps below:

1. Select Client Area, then drop down onto Employees

2. Enter surname & press Search

3. Click View

You will then be taken to the "Employee Details" screen

4. Select HS Profile tab

Selecting HS Profile will display existing Health surveillance checks that are set for the colleague.

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5. To add New to existing checks Press the "Add HS Checks" button

Home	Client Area	PAM Service	Reports

You are here: Home > Client Area > Employees > Employee Details

| General Details | GP Details | Managers | HS Profile | Consultation Rep... |

Add HS Checks

Show 20 records per page.

Guidance	Health Surveillance Type	Status	Date Last Medical	Recall Weeks	Due Date	Action
N/A	Freezer Worker Medical	Outstanding		1	18/04/2013	Refer Remove
N/A	Cholesterol Screening	Appointment Booked	22/03/2012	0	21/03/2013	View
N/A	Lung Function - Spirometry HS	Appointment Booked		0	20/03/2013	View
						Total: 3

Close

You are presented with the grid of the available HS checks

6. Select the required Health Assessment type by ticking the checkboxes

7. Specify the date of the last medical if known

or set the due date

	Health Assessment Type		Date	Due Date	Guidance	Current Status
☑	Cholesterol Screening		2	21/03/2013	N/A	Assigned
☐	Vocational Driver Medical (HS)			15/04/2013	N/A	Not assigned
☑	Freezer Worker Medical			18/04/2013	N/A	Assigned
☐	HEP B Booster			15/04/2013	N/A	Not assigned
☐	Hepititis B Vaccination (Energix) HS			15/04/2013	N/A	Not assigned
☑	Lung Function - Spirometry HS			20/03/2013	N/A	Assigned
☐	Night Workers Questionnaire			15/04/2013	N/A	Not assigned
☐	Urinalysis			15/04/2013	N/A	Not assigned
☐	Vaccination Screening			15/04/2013	N/A	Not assigned
☐	Vision Screening HS			15/04/2013	N/A	Not assigned
☐	Workplace Medical			15/04/2013	N/A	Not assigned
						Total: 11

Cancel Save

Press SAVE

The new assessment is successfully added to the Employees HS profile.

From the new profile you can:

Refer the colleague for an appointment

Home	Client Area	PAM Service	Reports	Help

You are here: Home > Client Area > Employees > Employee Details

| General Details | GP Details | Managers | HS Profile | Consultation Reports | Diary |

Add HS Checks

Show 20 rds per page.

Guidance	Health Surveillance Type	Status	Date Last Medical	Recall Weeks	Due Date	Action
N/A	Freezer Worker Medical	Outstanding		1	18/04/2013	Refer Remove
N/A	Cholesterol Screening	Appointment Booked	22/03/2012	0	21/03/2013	View
N/A	Lung Function - Spirometry HS	Appointment Booked		0	20/03/2013	View
						Total: 3

Close

Or: Remove the Health Assessment if no longer applicable by selecting 'Remove'

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7 How to Create a Health Surveillance Referral

Health Surveillance (HS) assessments are those which involve obtaining information about Employees' health and which helps protect Employees from health risks at work. For example: Audiometry (Hearing Tests), Lung Function and Lone Worker assessments. These assessments assist you to determine if an Employee is suitable to carry on in the job they are employed to do.

To create a new referral select NEW HS Referral from the Home Page

Search for the employee by typing their surname and press Search

Click the "Select" link in the "Action" column of the required employee

You are presented with the details of the selected employee

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| Home | Client Area | PAM Service | Reports | Help |

You are here: Home > Client Area > Health Surveillance > Add New Referral

Step 1. Select the Employee > **Step 2. Fill out the referral form >** Step 3. Referral Created

Personal Details:
ERN: 3977
Person ID:
Title: Mr
Gender: Male
Forename: Sidney
Surname: Seed
DoB: 28/02/1961

Employment Details:
Client: Warrington Co (Distribution) Ltd
Department: Warehouse
Job Title: Warehouse Operative

Contact Details:
Address 1: Unit 124
Address 2: Winwick Ind Est
Town: Warrington
Postcode: WA3 3SP
County: Cheshire
Telephone: 01942407049
Mobile: 07999999999
Email: ohioadmin@ohiosystems.co.uk

Referring Manager:
Name: Albert Trotter
Title: Mr
Job Title: Manager
E-mail: ian.jones@people-am.com
Telephone: 01925123456
Mobile: 07508509262

Referral Information:
Employee Name: Seed Sidney
Has employee been advised a Referral is being arranged? * ● Yes ○ No

Assessment Type: * Please select ▼
Please contact Client Services for assistance: 01925 227000

Supporting Documentation: [Browse...] [Upload]

Comments:

PO Number:

[Back] [Cancel] [Continue]

Callout: Specify whether the employee has been advised a referral is being made.

Callout: Select the Assessment you require from the drop down

Callout: Load any supporting documents and Add comments where necessary

Callout: Press Continue, then confirm and the referral will be made.

| Home | Client Area | PAM Service | Reports | Help |

You are here: Home > Client Area > Health Surveillance > Add New Referral

Step 1. Select the Employee > Step 2. Fill out the referral form > Step 3. Confirmation > **Step 4. Referral Created**

The referral for **Sidney Seed** has been logged and PAM Client Services have been notified.
A confirmation email will be sent to the referring manager email address with details of the referral.
The Referral ID for this referral is 23466, please use it for further reference.

[To Referral List] [Create New]

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Alternatively if the colleague appears on the Home Page Dashboard

Tip : To view all colleagues recall data click

View HS Recall Report

See example below

Alternatively you can refer direct from here.

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8 How to Create a Management Referral (Online Form)

A Management Referral is made when a Manager wishes to refer a Colleague to PAM due to Long Term Sickness Absence (LTSA), Short Term Sickness Absence (STSA), or Review of an employee at work but not doing the job they are employed to do because of a health reason, or a Review as part of a continuing assessment plan.

The aim is to provide advice regarding the likely duration of sickness absence; the functional effects of any ill health on the Colleague's work, how their health affects their ability to work, and suggested rehabilitation approaches back into the workplace where appropriate.

To create a referral select NEW Mgmt Referral from the Home Page

Search for the employee by typing their surname and press Search

Click the "Select" link in the "Action" column of the required employee

You are presented with the details of the selected employee.

Press "Continue" if the displayed employee record is correct.

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Fill out the online referral form:

On this page

- you have the ability to confirm the colleagues details are correct
- make amendments if necessary
- confirm who is the manager making the referral

Step 2.1 About the Employee

- Indicate the colleague has been advised about the referral
- Give details of whether the employee is a shift worker, is in work or not or whether any adjustments can be made to accommodate them
- Indicate the First date of Illness & First date of Absence.

Click "Continue" when all sections are completed.

Tip : Fields marked with * are mandatory

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Step 2.2 About the Referral

At each Step there is a Handy Hips icon to help you.

Referral Details Step 2.2 About The Referral >

Reason for Referral:

Short Term Absence
Long Term Absence
*Bakery Worker Health Screening
Presenteeism
Follow up review
Other

☑ Frequent or sporadic sickness please provide details below
☐ 21 days absence - longer than or likely to be longer than
☐ Bakery worker health screening
☐ In work not on full duties
☐ Employee needs a further consultation
☐ Other management concerns about employee

Indicate why you are referring them adding any additional comments in the box below.

Employees Reason for Absence:
Manager add comments

complains of sickness

Initial Referral: Please select ▾

Service Required: *Management Referral (OHA1) ▾

Do you require a pre consultation briefing with our clinician? *Yes ☑ No ☐

We actively encourage you to discuss referrals with our clinicians.

Do you require a post consultation briefing with our clinician? *Yes ☑ No ☐ Managers contact number: *078385948

Tell us the best phone number to contact you on

Step 2.3 About the Referral

Referral Details Step 2.3 Management Information >

Employees Absence History:

has been off sick for 2 days

Help us to provide answers to your questions regarding the referral

Advice Required from Occupational Health:

☑ What is the employees current fitness for work?
☑ Likely date of return to work?
☑ What effect will this condition have on the employees ability to carry out his/her duties?
* ☐ Are there any modifications / adjustments which would alleviate the condition or aid rehabilitation?
☐ Are there any particular duties the employee cannot do?
☐ What duties can the employee perform?
☐ Is the condition likely to re-occur in the future?

Please provide any supporting documents that are relevant to the referral:

[ ] Choose File   Upload   Purcha

X Cancel   < Back   Submit >

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The referral is now complete

From here you can either: book an appointment, create another referral or go to the referral list.

9 How to Create a Management Referral (Upload form)

A Management Referral is made when a Manager wishes to refer a Colleague to PAM due to Long Term Sickness Absence (LTSA), Short Term Sickness Absence (STSA), or Review of an employee at work but not doing the job they are employed to do because of a health reason, or a Review as part of a continuing assessment plan.

The aim is to provide advice regarding the likely duration of sickness absence; the functional effects of any ill health on the Colleague's work, how their health affects their ability to work, and suggested rehabilitation approaches back into the workplace where appropriate.

To create a referral select NEW Mgmt Referral from the Home Page

Search for the employee by typing their surname and press Search

Click the "Select" link in the "Action" column of the required employee

You are presented with the details of the selected employee

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Confirm this is the right employee

Select reason for referral and service required.

Upload the referral form and any supporting documentation.

Enter any comments you feel are necessary.

Click on Continue when all areas are completed. Review the details and if correct press Continue again.

The referral is now complete

From here you can either: book an appointment, create another referral or go to the referral list.

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10 How to create a DAYONE referral via mobile

DAYONE is the collective name for first day Absence Management Service (AMS), Physio Information Line (PHiL) and the optional new employee Health Attendance Record Profile function (HARP).

Managers can use DAYONE to refer employees with Health concerns or Muscular Skeletal problems for a telephone consultation or for Non Health reasons they can chose to record the absence without making a referral.

Referrals to DAYONE can be made from a mobile by entering www.ohiosystems.co.uk into your mobile browser

Mobile screenshots

Android :

Create a shortcut on your mobile home page by pressing and holding the bookmark and selecting "Add shortcut to home page"

iPhone :

Create a Bookmark and Add to Home screen

Enter your email address in the same way you would on OHIO desktop (all in lowercase) followed by your OHIO password.

Press Login

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📧   🔲 📶 🔋 16:46

PAM DayOne

0330 6600 365

Step 1. Select the Employee
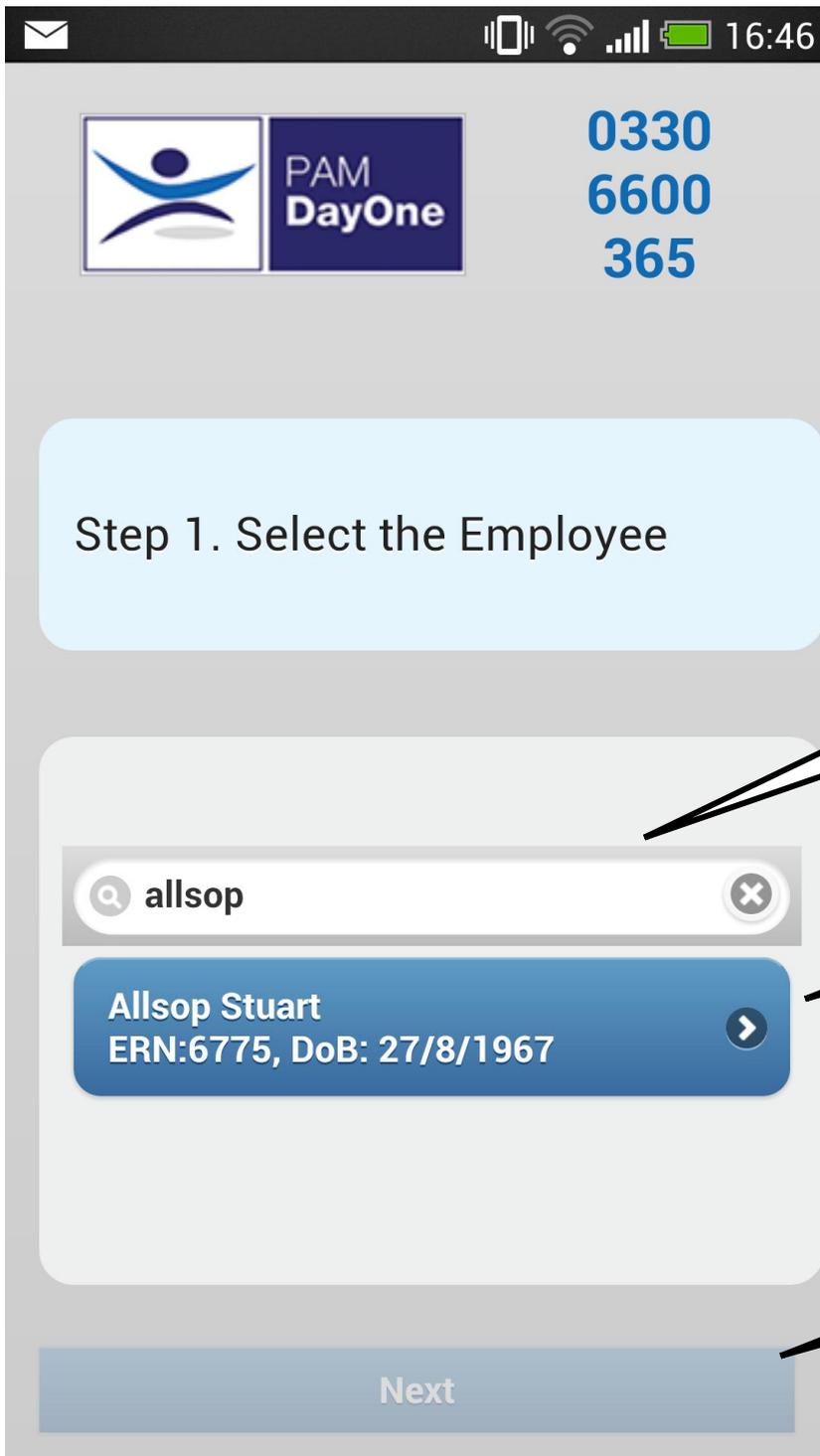
Type 4 or more characters of the employees surname and the predictive search will start to fill in the rest

🔍 **allsop** ✖

Allsop Stuart
ERN:6775, DoB: 27/8/1967 ❯

Press to select the right person

Click Next

Next

Make sure you indicate the employee is aware of the referral process

*⚡ ▯ 📶 13:17

When is the first day of absence?

04/09/2013 13:16:33

Day	Month	Year
03	Aug	2012
04	Sep	2013
05	Oct	2014

Indicate the date the absence started

What is the cause of absence?
Health ✓

Non - Health ●

Muscular - Sceletal ●

Choose the cause of absence

Can work place adjustments be accommodated?
Yes ●   No ✓

Indicate whether there are any possible adjustments to the employees working pattern to aide their return to work.

Can a late start be accommodated?
Yes ✓   No ●

Back

Next

0330 6600 365

Step 3. Add comments if neccessary:

Provide as much supporting information as possible

Comments:

Submit – creates a referral in Ohio and records the absence in the employee's attendance history

Save Absence – updates employee's attendance history (HARP) without making a referral

Back

Submit

Save Absence

Absence saved

Referral submitted absence
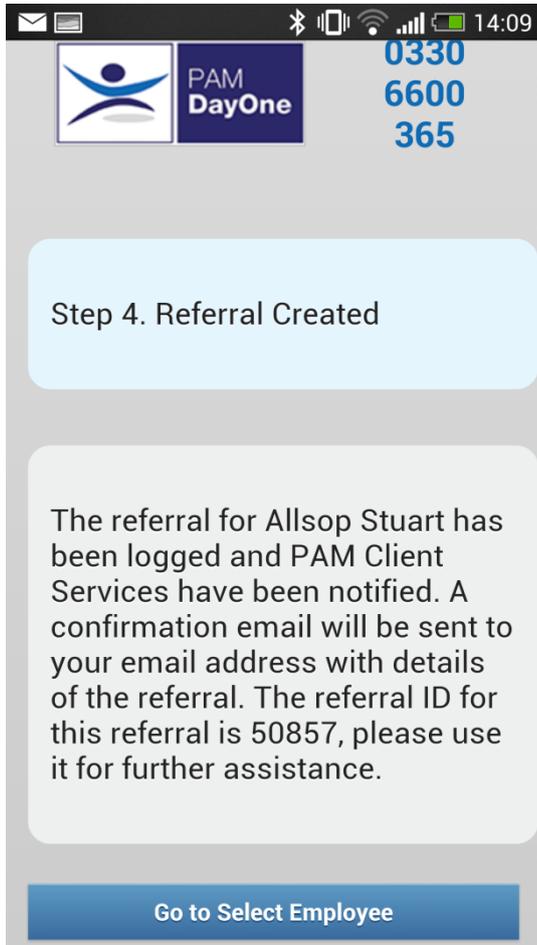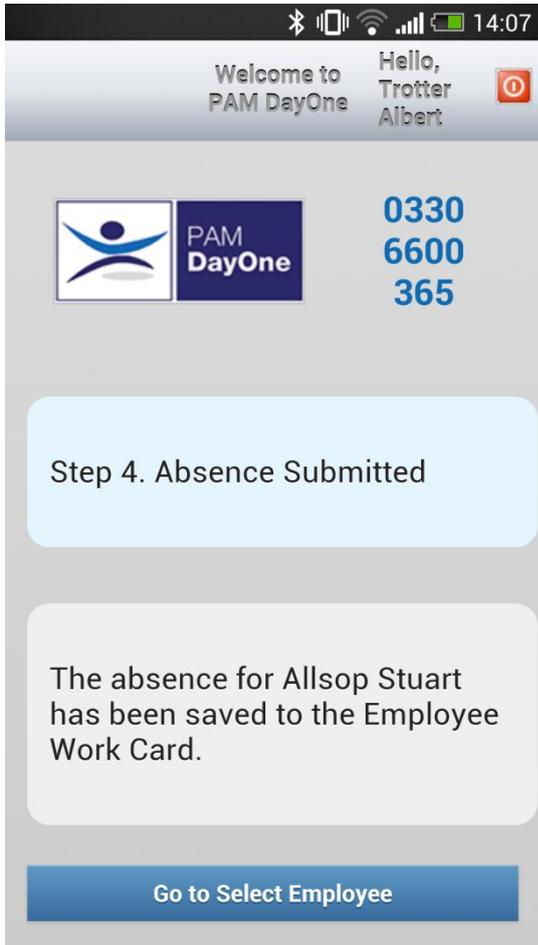
11 How to create a DAYONE referral

DAYONE is the collective name for first day Absence Management Service (AMS), Physio Information Line (PHiL) and the optional new employee Health Attendance Record Profile function (HARP).

Managers can use DAYONE to refer employees with Health concerns or Muscular Skeletal problems for a telephone consultation or for Non Health reasons they can chose to record the absence without making a referral.

Referrals to DAYONE can be made from the OHIO dashboard by pressing on Dashboard or from the Client Menu > DAYONE then Add New referral.

Then search for and select the employee you wish to refer

Having Selected the employee fill out the referral form below

Step 1. Select the Employee > **Step 2. Fill out the referral form** > Step 3. Referral Created

Personal Details **Contact Details**   **Employment Details**

Bunting Jeffery   20 Glover Drive Hyde   **Client:**   Warrington Co Ltd
DOB: 05/03/1962   Tameside Greater Manchester SK14 1RT   **Department:**   Warehouse
                                                           Job Title: Operative
                     Tel: 01234567890 / 07999999999
                     Email:
                     Are the employees personal details correct?   Yes ☑ No ☐   (Amend)

Make sure you indicate the employee is aware of the referral process

Referral Details

Has the employee been advised of the referral process? * Yes ☐ No ☐

When is the first day of absence? * [   ]

What is the cause of absence? * Health ☐ Muscular Skeletal ☐ Non-Health ☐

Can work place adjustments be accomodated? * Yes ☐ No ☐

Can a late start be accommodated? * Yes ☐ No ☐

Comments:

PO   [   ]

< Back   X Cancel   Save Absence   Submit Referral

Indicate the cause of the absence

Hover over the lightbulbs for handy hints and guidance

Save Absence – updates employees attendance history (HARP) without making a referral

Submit Referral - also records the absence in the employees attendance history

The referral has now been saved

Step 1. Select the Employee > Step 2. Fill out the referral form > **Step 3. Referral Created**

The referral for **Alec Bedser** has been logged and PAM DayOne have been notified.
The Referral ID for this referral is 47558. If you require any further assistance please call 03330 660 365, we are always happy to help.

Add New

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12 How to Book an Appointment

You will already have the clinic dates pre-booked and these can be seen on the Home page Dashboard where details of appointments scheduled in the next 30 days can be found. Before any appointment can be booked, you will first have to create a referral.

You can also see how many referrals have been booked in each clinic.

Appointments can be booked from several places within OHIO from

- the "Appointments" screen
- the "Referral Details" screen
- the "HS Recall" tab of the "Client Details" screen
- from the "HS Profile" of the "Employee Details" screen

However for illustrative purposes we will use a referral in the management referral well.

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Go into the Management Referral Well by letting the mouse hover over "Client Area", drop down onto "Management Referrals".

All referrals are stored in this section, including ones that require appointments to be booked.

Check the referral status to see what referrals need appointments. If the status is:

Submitted   =   referral has been made but no appointment booked

Live   =   referral made and appointment booked

Completed   =   Appointment has been closed and report ready to view.

Filter referrals by selecting "submitted" and click search

Select the name of the employee you wish to book an appointment for and click "view"

Referral ID	Client	ERN	Employee Name	Date Of Birth	Submission Date	Status	Payment Status	Appt ID	Appt Date	Clinic	Action
23705	Warrington Co (Distribution) Ltd	24652	Bucket Hyacinth	01/10/1952	27/11/2013 15:25	Submitted	Outstanding	N/A	N/A	N/A	View
23702	Warrington Co (Distribution) Ltd	6775	Allsop Stuart	27/09/1967	25/11/2013 16:18	Submitted	Outstanding	N/A	N/A	N/A	View
23699	Warrington Co (Dist Admin) Ltd	27094	Christmas Joe	16/02/1949	21/11/2013 14:34	Submitted	Outstanding	N/A	N/A	N/A	View
23697	Warrington Co (Distribution) Ltd	3978	Hill Harry	23/11/1981	19/11/2013 10:16	Submitted	Outstanding	N/A	N/A	N/A	View

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Home	Client Area	PAM Service	Reports

You are here: Home > PAM Service > Appointments > Book Appointment

Step 1. Select Appointment Type > **Step 2. Specify Appointment Detai**ls ... Confirm

Your location will appear. Select Booking Confirmed

Client:	* Warrington Co (Distribution) Lt
Appointment Status:	* Booking Confirmed
	☐ Is Master Appointment available to book it into?
	☑ Show Nearby Locations
Master Appointment ID:	* Please select View Details
Reason for Appointment:	* Management Referral
Referral ID:	* [23460] (Sidney Seed)
Employee:	* Sidney Seed
Services Requsted:	Management Referral (OHA1)
Price:	£0.00
PO Number:	N/A
Clinic:	* Warrington Distribution Co Diary Check diary
Clinician:	* Newton Pam Check diary
Appointment Date:	11/04/2013
Time:	* 09:15 – 10:00
Comments:	

Cancel   Continue

Tick "Show Nearby Locations" If you need to choose from other locations to book employees into.

This is dependent on the agreement of stores concerned and must be communicated to PAM so this feature can be enabled.

Choose from available dates. *If the date you require is missing please contact Client Services on 0845 643 5331*

Click "Diary" to see available appointment times. And enter the required Start time

Add comments where necessary before clicking Continue. Confirm again and the booking will be made.

As a Manager you will receive an email confirming the date & time

11/04/2013

Trotter Albert - (WCL001) Briefing
Trotter Albert - (WCL001)   Seed Sidney, 23460, Newton Pam

Trotter Albert - (WCL001) Lunch

The Diary schedule will also be updated with the new appointment.

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13 How to View a Consultation Report

Once a consultation has been completed, the clinician will upload the written report onto OHIO. When the booking is completed, the report automatically sits under the "Consultation Report" tab in the Employee record. This can then be view or printed off by the referring manager.

To view a consultation report, you can click the link in the email notification which will take you direct to the report, or simply follow the steps below:

Log onto OHIO and go into the Client Area, then Employees Section.

1 Type in surname of Employee and click search

2 Once you have located the correct Employee, click View. This will present the Employees record

3 Click on 'Consultation reports'

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You will then see a list of all consultation reports for this employee:

General Details	GP Details	Managers	HS Profile	Consultation Reports	Clinical Area	Diary

Created On	Created By	Referral ID	Appt ID	File Name
05/04/2012 16:32	Jones Ian	6017	13873	pam_oh_logo.jpg

4 The report can be viewed by clicking on the file. If required you can also print the report off

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14 How to Cancel a Booking

Occasionally it may be required to cancel an appointment on the day of a clinic, i.e. if an employee cannot make it and you want to book another employee into the time slot.

If a referral is no longer required, or has been duplicated, it must be withdrawn from the referral well, otherwise it will sit there indefinitely.

There are 2 ways you can cancel a booking, either through the Management Referral Well, or by going into the booking through the PAM Service menu.

To cancel a booking, go to the Management Referral Well,

> Select appointment you wish to cancel and click on the ID number

ERN	Employee Name	Date Of Birth	Submission Date ▼	Status	Payment Status	Appt ID	Appt Date
6777	Byrne Stephen	18/01/1967	18/06/2013 09:11	Live	Outstanding	35359	26/06/2013 09:30
24652	Bucket Hyacinth	01/10/1952	17/06/2013 10:51	Submitted	Outstanding	N/A	N/A
3976	Jones John	13/06/1991	12/06/2013 14:52	Submitted	Outstanding	N/A	N/A
3976	Jones John	13/06/1991	12/06/2013 14:52	Submitted	Outstanding	N/A	N/A
6785	Jacoby Derek	23/01/1959	11/06/2013 13:56	Completed	Outstanding	35354	14/06/2013 09:30
3976	Jones John	13/06/1991	07/06/2013 13:40	Submitted	Outstanding	N/A	N/A
6772	Jackson James	11/08/1977	31/05/2013 09:46	Submitted	Outstanding	N/A	N/A

This will take you into the appointment.

You are here: Home > PAM Service > Appointments > Appointment Details

General Details | History

Appointment ID:	35348
Client:	Warrington Co (Distribution) Lt
Appointment Status:	Booking Confirmed
Reason for Appointment:	Wellbeing Referral
Referral ID:	[23507] (Jed Butcher)
Employee:	Jed Butcher
Services Requsted:	Physiotherapy (Treatment) (£50.00)
Price:	£50.00
PO Number:	N/A
Clinic:	Palmyra Square Chambers
Clinician:	Newton Pam
Appointment Date:	29/05/2013
Time:	10:00 – 10:30

> Change appointment status to Withdrawn without Charge and click save.

⌃ Hide Comments

Created On	Created By	
23/05/2013 10:54	Hatton Gail	session 1 0f 4

Comments:

Add Comment

Save   Go to Clinical Area   Cancel

Another window will open asking for the reason why you are making changes to the booking, simply put the reason why and click save again. The booking has now been cancelled.

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Alternatively, to cancel a booking through the PAM Service area, go to Pam Service, click on Appointments on the drop down menu. Select the booking you wish to cancel by clicking on View.

The referral will drop back into the Referral Well and the status will be "**Reappoint".** You may book another appointment directly from this point, alternatively if the referral is no longer required, contact Client Services and they will cancel it down for you.

If you wish to cancel the whole day, please contact our Client Services and they will cancel this for you. Please note that any clinic cancelled within 14 days of the clinic date will be chargeable.

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15   How to Create an PHiL Referral

PHiL – Physiotherapy Information Line is our first day telephone service providing support and advice for colleagues with muscular skeletal injuries. Providing fast, effective physiotherapy intervention designed to keep your colleagues fit & reduce absence

To create a referral, select NEW PHiL Referral from the Home Page
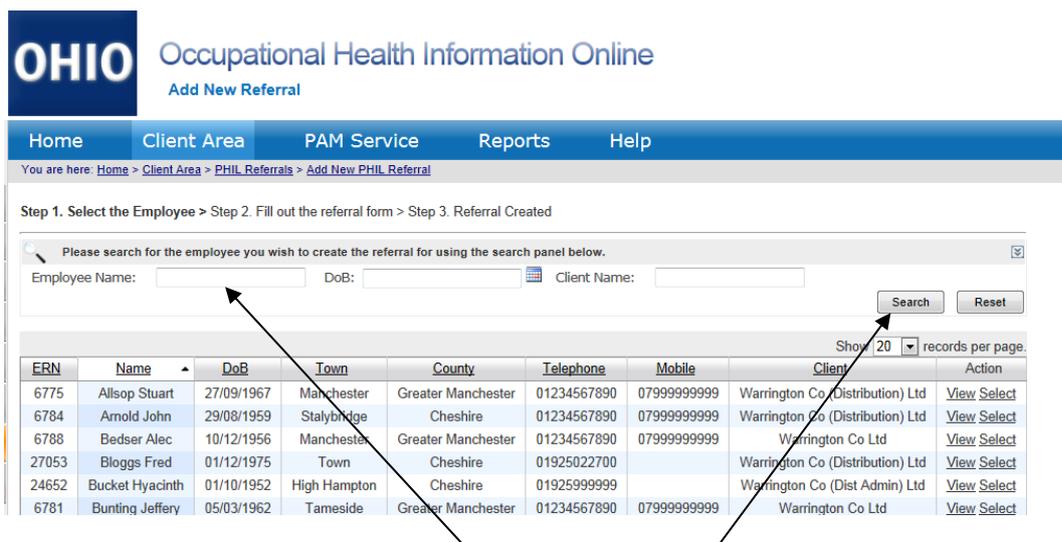
Search for the employee by typing their surname and press Search

Click the "Select" link in the "Action" column of the required employee

You are presented with the details of the selected employee

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Home   **Client Area**   P...   **Reports**   **Help**

You are here: Home > Client Area > PHIL Refe...

Step 1. Select the Employee > **Step 2. Fill out a** ... ... Step 3. Referral Created

Personal Details:
ERN: 3977
Person ID:
Title: Mr
Gender: Male
Forename: Sidney
Surname: Seed
DoB: 28/02/1961

Employment Deta...
Client: W... ...Co (Dist Admin) Ltd
Department: ...se
Job Title: ...ouse Operative

Contact Details:
Address 1:   Unit 124
Address 2:   Winwick Ind Est
Town: Warrington
Postcode: WA3 3SP
County: Cheshire
Telephone: 01942407049
Mobile: 07999999999
Email: employee@pam.co.uk

Referring Manager:
Name: Pamela Ewing
Title: Miss
Job Title: Admin Assistant
E-mail: test@pamgroup.co.uk
Telephone: 01942407049
Mobile: 07508509262

Specify whether the employee has been advised a referral is being made.

Referral Details:
Has employee been advised a Referral is being arranged?   * ○ Yes   ○ No

OHIO Service: * PHiL - Physio Triage/Advice Service
Price: £19.95 + VAT

Comments:

Add comments where necessary

PO Number:

[Back]   [Cancel]   [Continue]

Press "Continue" The referral is complete.

Home   **Client Area**   **PAM Service**   **Reports**   **Help**

You are here: Home > Client Area > PHIL Referrals > Add New PHIL Referral

Step 1. Select the Employee > Step 2. Fill out the referral form > **Step 3. Referral Created**

The referral for **Sidney Seed** has been logged and PAM Client Services have been notified.
A confirmation email will be sent to your email address with details of the referral.
The Referral ID for this referral is 23465, please use it for further reference.

[To Referral List]   [Create New]

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16 How to Run Health Surveillance re-call Report

For Trading Law, you will be required to print off a Health Surveillance Recall Report each week. Once all the Employees health surveillance profiles have been created and up to date, the report is very quick and easy to generate, simply follow the steps below:

1 Click on Reports located in Blue Main Menu bar at top of page
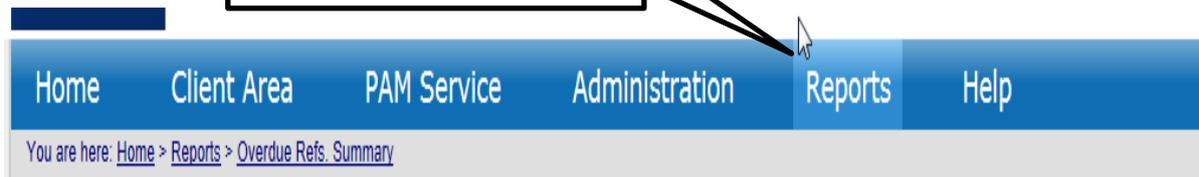
2 Select HS Recall report from the menu on the left hand side page.

This details any health surveillance which is due.

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Example of HS Recall Report is below:

> 3 Select which site and click search

> 4 The report will detail type of HS, employee name, date of last medical, no of recall weeks, date of next assessment

Search by

Client: * Asda Retail Head Office   Child Client: ----Asda Walton (4944)   ☐ Include child clients data

Date: ☐ — ☐   Status: Please select   [Search] [Reset]

[xport Page] [Export All]

int   Show 20 ▾ records per page

Client Name	Child Client	Employee Name	ERN	Employee Job Title	Date Of Birth	Health Surveillance Type	Status	Date Last Medical	Recall Weeks	Due Date ▲
Asda Retail North Wales & Liverpool Region	Asda Walton (4944)	Turner Anne	54661	Shop Floor Assistant	10/07/1963	Bakery Worker Health Screening	Referral Made	N/A	0	20/05/2013
Asda Retail North Wales & Liverpool Region	Asda Walton (4944)	Taylor Pauline	54679	Shop Floor Assistant	09/04/1965	Bakery Worker Health Screening	Referral Made	N/A	0	20/05/2013
Asda Retail North Wales & Liverpool Region	Asda Walton (4944)	Smith Thomas	55101	Shop Floor Assistant	19/09/1957	FLT/Vocational Driver Medical (HS)	Outstanding	02/05/2009	47	02/05/2014
Asda Retail North Wales & Liverpool Region	Asda Walton (4944)	Gee John	54903	Shop Floor Assistant	09/10/1975	FLT/Vocational Driver Medical (HS)	Outstanding	02/05/2009	47	02/05/2014
Asda Retail North Wales & Liverpool Region	Asda Walton (4944)	Davies Alyn	54656	Baker	07/11/1981	Bakery Worker Health Screening	Outstanding	13/05/2013	49	12/05/2014
Asda Retail North Wales & Liverpool Region	Asda Walton (4944)	Caffrey Irene	54639	Baker	07/09/1967	Bakery Worker Health Screening	Outstanding	13/05/2013	49	12/05/2014
Asda Retail North Wales & Liverpool Region	Asda Walton (4944)	Barnstable Sarah	54941	Shop Floor Assistant	12/07/1991	Bakery Worker Health Screening	Outstanding	13/05/2013	49	12/05/2014
Asda Retail North Wales & Liverpool Region	Asda Walton (4944)	Bramwell Laura	54927	Shop Floor Assistant	08/10/1990	Bakery Worker Health Screening	Outstanding	13/05/2013	49	12/05/2014
Asda Retail North Wales & Liverpool Region	Asda Walton (4944)	Day Ann	54839	Shop Floor Assistant	29/06/1971	Bakery Worker Health Screening	Outstanding	13/05/2013	49	12/05/2014

All reports can be exported onto an Excel Spreadsheet or printed directly from OHIO by clicking on the export or print tab below:

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17 How to Create a Wellbeing Triage Referral

A Wellbeing Referral is made when a Manager wishes to refer a Colleague to PAM for either Physiotherapy, Counselling or to make an appointment for a Wellbeing Triage Clinic.

To create a referral select New Wellbeing Referral from the Home Page

Search for the employee by typing their surname and press Search

Click the "Select" link in the "Action" column of the required employee

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Fill out the online referral form:

On this page

- you have the ability to confirm the colleagues details are correct
- make amendments if necessary
- confirm who is the manager making the referral

Click "Continue" when all sections are completed.

Tip : Fields marked with * are mandatory

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Step 2.2 About the Referral

At each Step there is a Handy Hips icon to help you.

| Home | Client Area | PAM Service | Administration | Reports | Help |

You are here: Home > Client Area > W... ...eferrals > Add New WB Referral

Referral Details   Step 2.2 Management Information >

Employees Absence History:

Constently off sick with depression

Provide details about the colleague's & absence details

Required from Occupational Health:

- ☑ What is the employees current fitness for work?
- ☑ Likely date of return to work?
- ☐ What effect will this condition have on the employees ability to carry out his/her duties?
- * ☑ Are there any modifications / adjustments which would alleviate the condition or aid rehabilitation?
- ☐ Are there any particular duties the employee cannot do?
- ☐ What duties can the employee perform?
- ☐ Is the condition likely to re-occur in the future?

Help us to provide answers to your questions regarding the referral

Please provide any supporting documents that are relevant to the referral:

[   ] Choose File   Upload

Upload any further documents here

Purchase Order Number: [   ]   Client Reference Number: [   ]

X Cancel   < Back   Submit >

Once all fields have been completed click on Submit. The

| Home | Client Area | PAM Service | Administration | Reports | Help |

You are here: Home > Client Area > Wellbeing Referrals > Add New WB Referral

Step 1. Select the Employee > Step 2. Fill out the referral form > **Step 3. Referral Created**

The referral for **Harry Hill** has been logged and PAM Client Services have been notified.
A confirmation email will be sent to your email address with details of the referral.
The Referral ID for this referral is 47706, please use it for further reference.

To Referral List   Create New   Book Appointment

From here you can either: book an appointment, create another referral or go to the referral list.

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18   Nightworker Assessments

Any employee who works regular night shifts must be given the option to complete a Nightworkers Questionnaire on a yearly basis.

There are 3 possible outcomes to this questionnaire:
1) Employee opts out of completing the questionnaire – in this case the recall date just needs to be reset to the next date it is due.
2) Employee completes questionnaire and everything is ok – again, no referral need be made, just the recall date being altered.
3) Employee completes questionnaire and wishes to speak to OHA, or the manager would like further advice on answers given – referral to be made and booked into your next occupational health clinic

To re set the recall date, follow the steps below:

You will then be taken to the "Employee Details" screen

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TIP: Selecting Health Surveillance Profile will display existing health surveillance assessments that are set for the employee.

Refer to the Health Policy for what health surveillance is required.

You are presented with the grid of the available Health Surveillance assessment below:

You are presented with the grid of the available HS checks

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6. Specify the date the nightworker questionnaire was completed

and set the due date for the following year

Press SAVE

The recall date has been successfully changed.

Alternatively if you wish to make a referral, simply click on the "Refer" button.

Refer the colleague for an appointment

Or remove the Health Assessment if no longer applicable by selecting 'Remove'. The employee's electronic file will be archived on OHIO and can be accessed again by contacting the OHIO support line

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19 MI Reports

Ohio contains a comprehensive selection of Standard reports available 24/7 for managers' to access. All the reports contain pre-defined selection criteria to enable managers' to target specific areas of interest. All reports are printable but can also be exported to Excel for further manipulation if so required.

Managers will only see data for those areas they are responsible for. If applicable managers may drill down to lower levels of the hierarchy by selecting from the "Child Client" dropdown list.

20 Frequently Asked Questions

Q   **Who do I contact if I need further assistance on OHIO?**
A   You should contact your local PAM Client Services who will be happy to help or by contacting our national help line on 0845 6435331

Q   **What do I do if I lose/forget my password?**
A   Click the Forgot Password button on the home page and the system will automatically generate and send you a new temporary password.

Q   **What if I do not receive an email with a new password?**
A   Make sure you enter your full email address all in lower case i.e. jbloggs@companyco.uk

Q   **I have requested a new password but still can't login?**
A   If you have made several unsuccessful attempts to login the security features of OHIO will lock your account. In this instance please contact 08456435331 or email ithelpdesk@pamgroup.co.uk

Q   **How do I set up my employees so they will appear in the HS Recall well?**
A   Go into Client Area > Employees – Select Employee & click on view.
    Click on HS Profile tab at top of screen, click on Add HS Checks
    Select HS check to be added, enter date of last HS check, enter due date of next HS check and click save. Recall period will automatically be set.

Q   **How do I know what health surveillance is required for an Employee?**
A. Always check with the Policy as to what health surveillance is required for any particular job role. Speak to your HR dept.

Q   **What if an Employee leaves?**
A   Forward details to client services who will archive the employee(s) for you.

Q   **How do I set up a new Employee?**
A   Go into Client Area > Employees – Add New.
    Complete all the details and click save.

Q   **What if there are large numbers of employees to be created?**
A   An Excel template is available which can be populated and returned to PAM to load for you.

Q   **How do I set up a new referring manager as an OHIO user?**
A   Go into the Employee record on OHIO and tick the "Has access to OHIO" box. You will be required to add their email address also and this will generate a username and temporary password for them. If you need to remove access then you should follow the same process and un-tick the box.

Q   **Why can't I book a health surveillance referral into my clinic?**
A   You will need to contact PAM Client Services so they can add the service required into the Master Appointment and check if the clinician has the necessary equipment.

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Q. **I'm trying to book an appointment but it keeps asking for a Referral ID**

A. There are a number of reasons why the system will ask for a Referral ID:

No referral has been made, before any appointment is booked you must make a referral, check to see if this has been done.

There is no clinic date booked in, check with Client Services to see if the Master appointment has been booked.

The incorrect service has been requested on the referral, contact Client Services and ask them to change the service; or add this service to the Master Appointment.

The Master Appointment may still be set to "provisional". Client Services can change this to "Confirmed" for you.