



OHIO Client User Guide

CLIENT USER GUIDE to OHIO

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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.

The screenshot shows the PAM OHIO website landing page. At the top left is the OHIO logo. The main heading reads "Welcome to PAM OHIO occupational health information". Below this is a login form with fields for "Username:" and "Password:", a "Login" button, and links for "Keep me logged in" and "Forgot Password".

Callout boxes provide additional information:

- Top Right:** Login using your email address (all in lower case) & password
- Left Side (Medicine Chest):** Medicine Chest is a PAM website containing 9000 pages of useful help & advice on medical condition sourced from NHS Choices.
- Bottom Center (COMPASS):** Compass Quarterly newsletter containing articles & features promoting health & wellbeing

Other visible content includes a "Health News" section for Movember, a "Medicine Chest" tile with a green cross icon, a "FIT4JOBS" tile, a "PHIL" (Physio Information Line) tile, and a "PAM DayOne" tile.

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.

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 referrals.



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.

You have 2 master appointments scheduled within the next 30 days

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

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

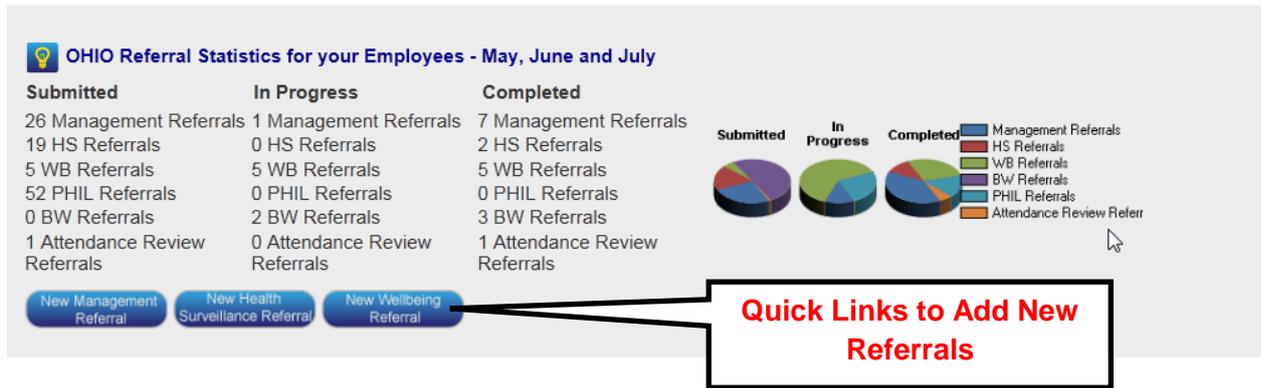
Click on view to see what time slots are available

Health Surveillance Dashboard

You have 9 employees due for assessment within the next 3 month. [View Health Surveillance Recall Report](#)

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	entertainer	27588	01/01/1960	FLT/Vocational Driver Medical (HS)	Outstanding		0	09/08/2014		Refer

Ability to refer for appointment



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](#)

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.

The screenshot shows the 'Client Area' navigation menu with options: Home, Client Area, PAM Service, Reports, and Help. Below the menu is a breadcrumb trail: 'You are here: Home > Client Area > Clients'. A search form titled 'Search client by' includes fields for Client Name, Client Code, Location, and Clinic Name. It also has a Record Status dropdown set to 'Live' and a checkbox for 'Show Head offices only'. Search and Reset buttons are present. Below the search form are 'Export Page' and 'Export All' buttons. The main content area displays a table of clients with columns: Client ID, Reference ID, Client Name, Status, Town, County, Telephone, Contact Name, Contact E-mail, and Action. The table shows three entries for Warrington Co. A 'Total: 3' summary is at the bottom right.

Client ID	Reference ID	Client Name	Status	Town	County	Telephone	Contact Name	Contact E-mail	Action
WCL001001	N/A	Warrington Co (Dist Admin) Ltd	Live	Warrington	Cheshire	01925222222	Frost Jack	jim.murphy@people-am.com	View
WCL001	N/A	Warrington Co (Distribution) Ltd	Live	Warrington	Cheshire	01925123456	Trotter Albert	albert@ohiosystems.co.uk	View
WCL	N/A	Warrington Co Ltd	Live	Warrington	Cheshire	01925123456	Trotter Derek	info@ohiosystems.co.uk	View

Total: 3

ALTERNATIVELY

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

The screenshot shows the 'Employee Section' search form. It includes fields for Client (set to 'Warrington Co (Distributi)'), Employee Name, Record Status (set to 'Live'), and Department. Search and Reset buttons are present. Below the search form are buttons for 'Add New', 'Import Employees', 'Export Page', 'Export All', and 'Bulk Edit'. The main content area displays a table of employees with columns: ERN, Status, Name, Town, DoB, Job Title, Referring Manager, Telephone, Mobile, and Action. The table shows seven entries. Callout boxes provide instructions: '1. Type in the managers surname and click search' points to the Employee Name field; '2. Once you have located the correct manager, click View.' points to the 'View' link in the Action column; '3. Click on Managed Locations tab' points to the bottom of the page.

ERN	Status	Name	Town	DoB	Job Title	Referring Manager	Telephone	Mobile	Action
6775	Live	Allsop Stuart	Manchester	27/09/1967	Operative	Trotter Albert	01234567890	07999999999	View Print
6784	Live	Arnold John	Stalybridge	29/08/1959	Operative	Trotter Albert	01234567890	07999999999	View Print
3978	Live	Hill Harry	Warrington	23/11/1981	Warehouse Operative	Trotter Albert	01942407049	07999999999	View Print
6782	Live	Holmes Andrew	Manchester	19/08/1961	Operative	Trotter Albert	01234567890	07999999999	View Print
6785	Live	Jacoby Derek	Manchester	23/01/1959	Operative	Trotter Albert	01234567890	07999999999	View Print
19121	Live	Jeans Terri	o	01/01/1950	test	Trotter Albert	01925222222		View Print
3976	Live	Jones John	Warrington	13/06/1991	FLT Operative	Trotter Albert	01942407049	07999999999	View Print

Home	Client Area	PAM Service	Reports	Help	
You are here: Home > Client Area > Employees > Employee Details					
General Details	GP Details	Managers	HS Profile	Diary	Managed Locations
Record Status: Live		Reason: *			
Personal Details: ERN: 3979 Person ID: <input type="text"/> ESR Number: <input type="text"/> Title: * Miss Gender: * Female Forename: * Pamela Surname: * Ewing DoB: 15/06/1985		Contact Details: Address 1: * Unit 126 Address 2: Winwick Ind Est Town: Warrington Postcode: * WA3 3SP County: Cheshire Telephone: 01942407049 Mobile: 07999999999 Email: * gail.hatton@people-am.c Reminder method: Email <input checked="" type="checkbox"/> SMS <input type="checkbox"/>		Employment Details: Client: Warring Department: Wareho Job Title: * Admin A Last Flu Vaccination Date:	
Does the employee have access to OHIO? <input checked="" type="checkbox"/>					

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

Home	Client Area	PAM Service	Reports	Help	
You are here: Home > Client Area > Employees > Employee Details					
General Details	GP Details	Managers	HS Profile	Diary	Managed Locations
Please, select the locations this Referring Manager will be working with. Once selected and saved, Referring Manager will be automatically linked to the selected Client Records.					
Locations in the hierarchy:		Warrington Co (Dist Admin) Ltd Warrington Co (Distribution) Ltd Warrington Co Ltd		Locations assigned to Referring Manager:	
<input type="button" value="Cancel"/>					

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.

Search employees by

Client: Employee Name: ERN:

Record Status: Department:

<input type="checkbox"/>	ERN	Status	Name	Town	DoB	Job Title	Referring Manager	Telephone	Mobile	Action
<input type="checkbox"/>	6775	Live	Allsop Stuart	Manchester	27/09/1967	Operative	Trotter Albert	01234567890	07999999999	View Print
<input type="checkbox"/>	6784	Live	Arnold John	Stalybridge	29/08/1959	Operative	Trotter Albert	01234567890	07999999999	View Print
<input type="checkbox"/>	3978	Live	Hill Harry	Warrington	23/11/1981	Warehouse Operative	Trotter Albert	01942407049	07999999999	View Print
<input type="checkbox"/>	6782	Live	Holmes Andrew	Manchester	19/08/1961	Operative	Trotter Albert	01234567890	07999999999	View Print
<input type="checkbox"/>	6785	Live	Jacoby Derek	Manchester	23/01/1959	Operative	Trotter Albert	01234567890	07999999999	View Print
<input type="checkbox"/>	19121	Live	Jeans Terri	o	01/01/1950	test	Trotter Albert	01925222222	07999999999	View Print
<input type="checkbox"/>	3976	Live	Jones John	Warrington	13/06/1991	FLT Operative	Trotter Albert	01942407049	07999999999	View Print

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

This will take you into the Employee Details

Home Client Area PAM Services Reports Help

You are here: [Home](#) > [Client Area](#) > [Employees](#) > [Employee Details](#)

Record Status: Reason: *

Personal Details:

ERN: 3979

Person ID:

ESR Number:

Title: *Miss

Gender: *Female

Forename: *Pamela

Surname: *Ewing

DoB: 15/06/1985

Contact Details:

Address 1: *Unit 126

Address 2: Winwick Ind Est

Town: Warrington

Postcode: *WA3 3SP

County: Cheshire

Telephone: 01942407049

Mobile: 07999999999

Email: *gail.hatton@people-am.c

Reminder method: Email SMS

Employment Details:

Client:

Department:

Job Title: *Admin /

Last Flu Vaccination Date:

Does the employee have access to OHIO?

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

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

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

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

Record Status...

Personal Details:
 ERN: 3976
 Person ID:
 Title: Mr
 Gender: Male
 Forename: John
 Surname: Jones
 DoB: 13/06/1991

Employment Details:
 Client: Warrington Co (Distributi
 Department: Warehouse
 Job Title: FLT Operative
 Has Access To OHIO:

Contact Details:
 Address 1: Unit 123
 Address 2: Winwick Ind Est
 Town: Warrington
 Postcode: WA3 3SP
 County: Cheshire
 Telephone: 01942407049
 Mobile: 07999999999
 Email: ohioadmin@people-am.com

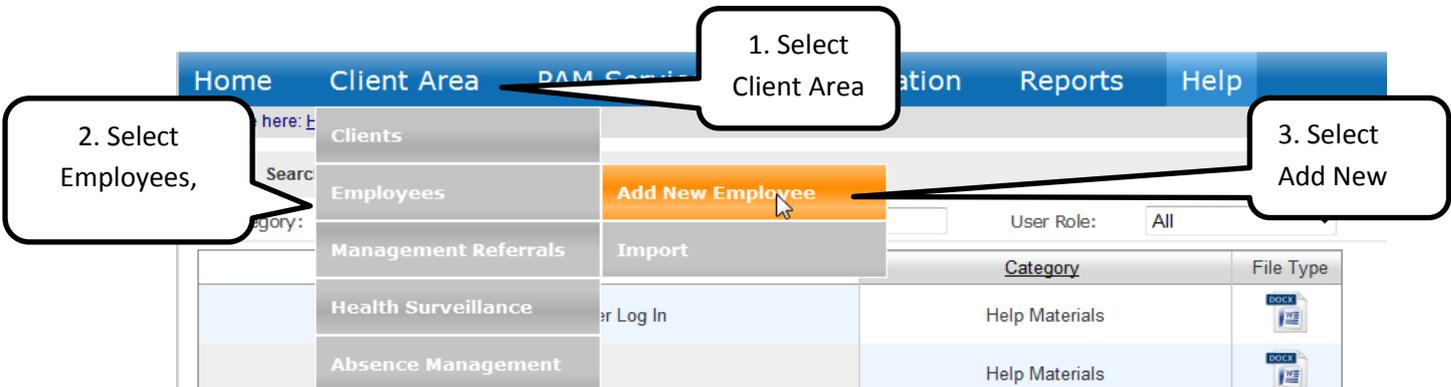
Referring Manager:
 Name: Trotter Albert
 Title: Mr
 Job Title: Manager
 E-mail: ian.jones@people-am.com
 Telephone: 01925123456
 Mobile:

Cancel | Print Report | Save

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



You are presented with the “Add New Employee” screen
Fill out the details of the Employee

The image shows the 'Add New Employee' form. The breadcrumb trail is: Home > Client Area > Employees > Add New Employee. The form is divided into several sections: 'Personal Details' (ER#, Person ID, Title, Gender, Forename, Surname, DoB), 'Contact Details' (Address 1, Address 2, Town, Postcode, County, Telephone, Mobile, Email, Reminder method), 'Employment Details' (Client, Department, Job Title, Daily Rate, Hourly Rate, Contracted Daily Hours, Last Flu Vaccination Date), and 'Referring Manager' (a dropdown menu). A checkbox at the bottom asks 'Does the employee have access to OHIO?'. Callout boxes provide instructions: 'Tip : Fields marked with * are mandatory' points to the asterisks on Title, Gender, Job Title, and Daily Rate; 'Do not tick this box unless the employee is to have access to OHIO' points to the 'Does the employee have access to OHIO?' checkbox. 'Cancel' and 'Save' buttons are at the bottom right.

Press the “Save” button
The employee has been created.

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

ER/N	Status	Name	Town	DoB	Job Title	Referring Manager	Telephone	Mobile	Action
6775	Live	Allsop Stuart	Manchester	27/09/1967	Operative	Trotter Albert	01234567890	07999999999	View Print
6784	Live	Arnold John	Stalybridge	29/08/1959	Operative	Trotter Albert	01234567890	07999999999	View Print
6788	Live	Bedser Alec	Manchester	10/12/1956	FLT Driver	Trotter Albert	01234567890	07999999999	View Print
27053	Live	Bloggs Fred	Town	01/12/1975	TEster	Trotter Albert	01925022700		View Print
24652	Live	Bucket Hyacinth	High Hampton	01/10/1952	Lady of the House	Frost Jack	01925999999		View Print
6781	Live	Bunting Jeffery	Tameside	05/03/1962	Operative	Trotter Albert	01234567890	07999999999	View Print
6776	Live	Burke Ted	Manchester	15/03/1957	FLT Driver	Trotter Albert	01234567890	07999999999	View Print

You will then be taken to the “Employee Details” screen

4. Select HS Profile tab

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

Record Status...

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

Contact Details:
 Address1: Unit 124
 Address2: Winwick Ind Est
 Town: Warrington
 Postcode: WA3 3SP
 County: Cheshire
 Telephone: 01942407049
 Mobile: 07999999999
 Email: ohioadmin@ohiosystems.co.uk

Employment Details:
 Client: Warrington Co. (Distribution) Lt
 Department:
 Job Title:
 Has Access To OHIO

Referring Manager:
 Name: Frost Jack
 Title: Mr
 Job Title: Owner
 E-mail: jim.murphy@people-am.com
 Telephone: 01925999999
 Mobile: 07770654321

Buttons: Cancel, Print Report, Save

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

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

The screenshot shows the 'Add HS Checks' button highlighted in blue. The interface includes a navigation bar with 'Home', 'Client Area', 'PAM Service', and 'Reports'. Below the navigation bar, there are tabs for 'General Details', 'GP Details', 'Managers', 'HS Profile', and 'Consultation Reports'. The 'Add HS Checks' button is located at the top left of the main content area.

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

The screenshot displays a grid of available Health Assessment (HS) checks. Each row includes a checkbox, the 'Health Assessment Type', a date field for 'Date Last Medical', a date field for 'Due Date', 'Guidance', and 'Current Status'. The 'Lung Function - Spirometry HS' row is highlighted. Callouts point to the checkboxes and the date fields.

	Health Assessment Type	Date Last Medical	Due Date	Guidance	Current Status
<input checked="" type="checkbox"/>	Cholesterol Screening	22/03/2012	21/03/2013	N/A	Assigned
<input checked="" type="checkbox"/>	Vocational Driver Medical (HS)		15/04/2013	N/A	Not assigned
<input checked="" type="checkbox"/>	Freezer Worker Medical		18/04/2013	N/A	Assigned
<input type="checkbox"/>	HEP B Booster		15/04/2013	N/A	Not assigned
<input type="checkbox"/>	Hepatitis B Vaccination (Energinx) HS		15/04/2013	N/A	Not assigned
<input checked="" type="checkbox"/>	Lung Function - Spirometry HS		20/03/2013	N/A	Assigned
<input type="checkbox"/>	Night Workers Questionnaire		15/04/2013	N/A	Not assigned
<input type="checkbox"/>	Urinalysis		15/04/2013	N/A	Not assigned
<input type="checkbox"/>	Vaccination Screening		15/04/2013	N/A	Not assigned
<input type="checkbox"/>	Vision Screening HS		15/04/2013	N/A	Not assigned
<input type="checkbox"/>	Workplace Medical		15/04/2013	N/A	Not assigned

The new assessment is successfully added to the Employees HS profile. From the new profile you can:

Press SAVE

Refer the colleague for an appointment

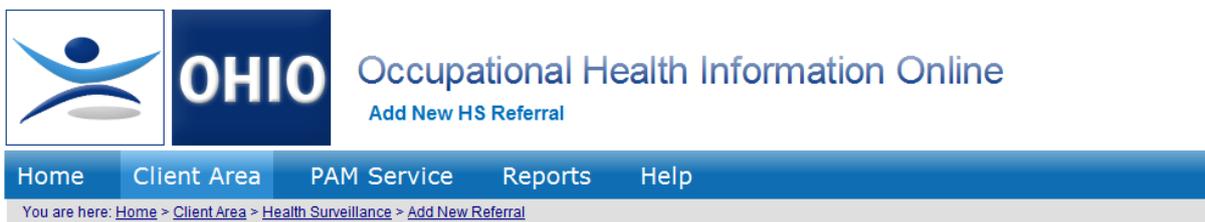
The screenshot shows the 'Add HS Checks' grid with the 'Refer' link in the 'Action' column highlighted. A callout points to this link with the text 'Refer the colleague for an appointment'.

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

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



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

Please search for the employee you wish to create the referral for using the search panel below.

Employee Name: DoB: Client Name:

ERN	Name	DoB	Town	County	Telephone	Mobile	Client	Action
27116	Adlington Becky	19/02/1974					Warrington Co (Dist Admin) Ltd	View Select
6775	Allsop Stuart	27/09/1967	Mancheste	Greater Manchester	01234567890	07999999999	Warrington Co (Distribution) Ltd	View Select
6784	Arnold John	29/08/1959	Stalybridge	Cheshire	01234567890	07999999999	Warrington Co (Dist Admin) Ltd	View Select
27115	Beckham David	16/02/1967	Warrington				Warrington Co (Dist Admin) Ltd	View Select
6788	Bedser Alec	10/12/1956	Manchester	Greater Manchester	01234567890	07999999999	Warrington Co (Dist Admin) Ltd	View Select

Show 20 records per 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

OHIO Support Line 0845 6435331

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:

Load any supporting documents and Add comments where necessary

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

Select the Assessment you require from the drop down

Back Cancel Continue

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

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

Alternatively if the colleague appears on the Home Page Dashboard

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	Bucket Hyacinth	Lady of the House	24652	01/10/1952	Hepatitis B Vaccination (EnergiX) HS	Outstanding		0	21/03/2013		Refer
Warrington Co (Dist Admin) Ltd	Bucket Hyacinth	Lady of the House	24652	01/10/1952	Vision Screening HS	Outstanding		0	21/03/2013		Refer
Warrington Co Ltd	Byrne Stephen	FLT Driver	6777	18/01/1967	FLT/Vocational Driver Medical (HS)	Outstanding		0	03/04/2013		Refer
Warrington Co (Distribution) Ltd	Bloggs Fred	TEster	27053	01/12/1975	FLT/Vocational Driver Medical (HS)	Outstanding		0	11/04/2013		Refer
Warrington Co (Distribution) Ltd	Hill Harry	Warehouse Operative	3978	23/11/1981	Night Workers Questionnaire	Outstanding		1	14/04/2013		Refer

Tip : To view all colleagues recall data click [View HS Recall Report](#)
See example below

Alternatively you can refer direct from here.

OHIO Occupational Health Information Online
HS Recall Report

Today is Wednesday, 10 April 2013
Welcome Albert Trotter | [Log Out] [Change Password]

Client Name	Child Client	Employee Name	ERN	Employee Job Title	Date Of Birth	Health Surveillance Type	Status	Date Last Medical	Recall Weeks	Due Date
Warrington Co Ltd	Warrington Co (Distribution) Ltd	Seed Sidney	3977	Warehouse Operative	28/02/1961	Lung Function - Spirometry HS	Appointment Booked	N/A	0	20/03/2013
Warrington Co (Distribution) Ltd	Warrington Co (Dist Admin) Ltd	Bucket Hyacinth	24652	Lady of the House	01/10/1952	Vision Screening HS	Outstanding	N/A	0	21/03/2013
Warrington Co Ltd	Warrington Co (Distribution) Ltd	Seed Sidney	3977	Warehouse Operative	28/02/1961	Cholesterol Screening	Appointment Booked	22/03/2012	0	21/03/2013
Warrington Co (Distribution) Ltd	Warrington Co (Dist Admin) Ltd	Bucket Hyacinth	24652	Lady of the House	01/10/1952	Hepatitis B Vaccination (EnergiX) HS	Outstanding	N/A	0	21/03/2013
Warrington Co Ltd	N/A	Byrne Stephen	6777	FLT Driver	18/01/1967	FLT/Vocational Driver Medical (HS)	Outstanding	N/A	0	03/04/2013
Warrington Co Ltd	Warrington Co (Distribution) Ltd	Bloggs Fred	27053	TEster	01/12/1975	FLT/Vocational Driver Medical (HS)	Outstanding	N/A	0	11/04/2013
Warrington Co Ltd	Warrington Co (Distribution) Ltd	Hill Harry	3978	Warehouse Operative	23/11/1981	Night Workers Questionnaire	Outstanding	N/A	1	14/04/2013
Warrington Co Ltd	Warrington Co (Distribution) Ltd	Seed Sidney	3977	Warehouse Operative	28/02/1961	Freezer Worker Medical	Outstanding	N/A	1	18/04/2013
Warrington Co Ltd	N/A	Bedser Alec	6788	FLT Driver	10/12/1956	FLT/Vocational Driver Medical (HS)	Outstanding	N/A	2	25/04/2013
Warrington Co Ltd	N/A	Bedser Alec	6788	FLT Driver	10/12/1956	Night Workers Questionnaire	Outstanding	05/12/2012	2	25/04/2013
Warrington Co Ltd	Warrington Co (Distribution) Ltd	Allsop Stuart	6775	Operative	27/09/1967	Cholesterol Screening	Outstanding	10/09/2012	22	09/09/2013

8 How to Create a Management Referral (Online Form)

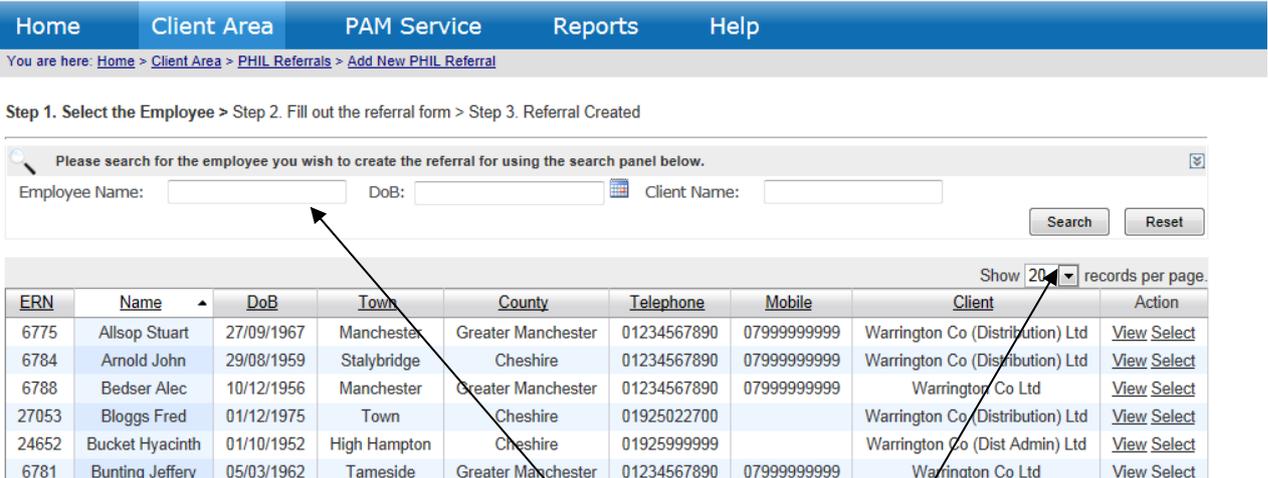
A Management Referral is made when a Manager wishes to refer a Colleague to PAM due to Long Term Sickness Absence (LTSA), Short Term Sickness Absence (STSA), or Review of an employee at work but not doing the job they are employed to do because of a health reason, or a Review as part of a continuing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



The screenshot shows the OHIO Occupational Health Information Online website. The navigation menu includes Home, Client Area, PAM Service, Reports, and Help. Below the menu, there are five buttons: New DayOne Referral, New Health Surveillance Referral, New Management Referral, New PHIL Referral, and New Wellbeing Referral. An arrow points to the 'New Management Referral' button.



The screenshot shows the search panel and a table of employee records. The search panel includes fields for Employee Name, DoB, and Client Name, with Search and Reset buttons. The table lists employee records with columns for ERN, Name, DoB, Town, County, Telephone, Mobile, Client, and Action. An arrow points to the 'View Select' link in the Action column of the first row.

ER	Name	DoB	Town	County	Telephone	Mobile	Client	Action
6775	Allsop Stuart	27/09/1967	Manchester	Greater Manchester	01234567890	07999999999	Warrington Co (Distribution) Ltd	View Select
6784	Arnold John	29/08/1959	Stalybridge	Cheshire	01234567890	07999999999	Warrington Co (Distribution) Ltd	View Select
6788	Bedser Alec	10/12/1956	Manchester	Greater Manchester	01234567890	07999999999	Warrington Co Ltd	View Select
27053	Bloggs Fred	01/12/1975	Town	Cheshire	01925022700		Warrington Co (Distribution) Ltd	View Select
24652	Bucket Hyacinth	01/10/1952	High Hampton	Cheshire	01925999999		Warrington Co (Dist Admin) Ltd	View Select
6781	Bunting Jeffery	05/03/1962	Tameside	Greater Manchester	01234567890	07999999999	Warrington Co Ltd	View Select

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.

OHIO Support Line 0845 6435331

Fill out the online referral form:

The screenshot shows the 'Referral Form - Allsop Stuart' interface. It is divided into three main sections: Personal Details, Contact Details, and Employment Details. The 'Referring Manager' section is also visible on the right.

Personal Details: DOB: 27/09/1967, 16 Grange Avenue Levenshulme, Manchester Greater Manchester M19 2FY. Tel: 01234567890 / 07999999999. Email: hr@ohiosystems.co.uk. A checkbox asks 'Are the employees personal details correct?' with 'Yes' selected and 'No' unselected. An 'Amend' button is next to it.

Contact Details: (Empty fields)

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

Referring Manager: Albert Trotter (checkbox unselected), Pamela Ewing (checkbox selected).

Referral Details Step 2.1 About The Employee >

Has employee been advised a referral is being arranged? Yes No

Is the employee a shift worker? Yes No

First Date of illness:

First Date of absence: *

Can adjustments be made? Yes No

Callout boxes provide the following instructions:

- 'Confirm the referring manager' points to the 'Referring Manager' section.
- 'You have the ability to correct colleagues' records' points to the 'Amend' button.
- 'Provide details about the colleague's & absence details' points to the 'First Date of absence' field.
- 'You must advise colleague a referral has been arranged and click "yes"' points to the 'Yes' checkbox for 'Has employee been advised a referral is being arranged?'.

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

OHIO Support Line 0845 6435331

Step 2.2 About the Referral

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

Employees Reason for Absence:
Manager add comments

complains of sickness

Initial Referral:

Service Required:

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

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

Callouts:

- At each Step there is a Handy Hips icon to help you.
- Indicate why you are referring them adding any additional comments in the box below.
- We actively encourage you to discuss referrals with our clinicians.
- 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|

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:

Callout:

- Help us to provide answers to your questions regarding the referral

The referral is now complete

Help

The referral for **Stuart Allsop** 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 23532, 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.

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

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

Please search for the employee you wish to create the referral for using the search panel below.

Employee Name: DoB: Client Name:

ERIN	Name	DoB	Town	County	Telephone	Mobile	Client	Action
6775	Allsop Stuart	27/09/1967	Manchester	Greater Manchester	01234567890	07999999999	Warrington Co (Distribution) Ltd	View Select
6784	Arnold John	29/08/1959	Stalybridge	Cheshire	01234567890	07999999999	Warrington Co (Distribution) Ltd	View Select
6788	Bedser Alec	10/12/1956	Manchester	Greater Manchester	01234567890	07999999999	Warrington Co Ltd	View Select
27053	Bloggs Fred	01/12/1975	Town	Cheshire	01925022700		Warrington Co (Distribution) Ltd	View Select
24652	Bucket Hyacinth	01/10/1952	High Hampton	Cheshire	01925999999		Warrington Co (Dist Admin) Ltd	View Select
6781	Bunting Jeffery	05/03/1962	Tameside	Greater Manchester	01234567890	07999999999	Warrington Co Ltd	View Select

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

OHIO Support Line 0845 6435331

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.

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

14:20

m.ohiosystems.co.uk

Welcome to
PAM DayOne

 PAM
DayOne 0330
6600
365

Username:

Password:

Log in



Android :

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

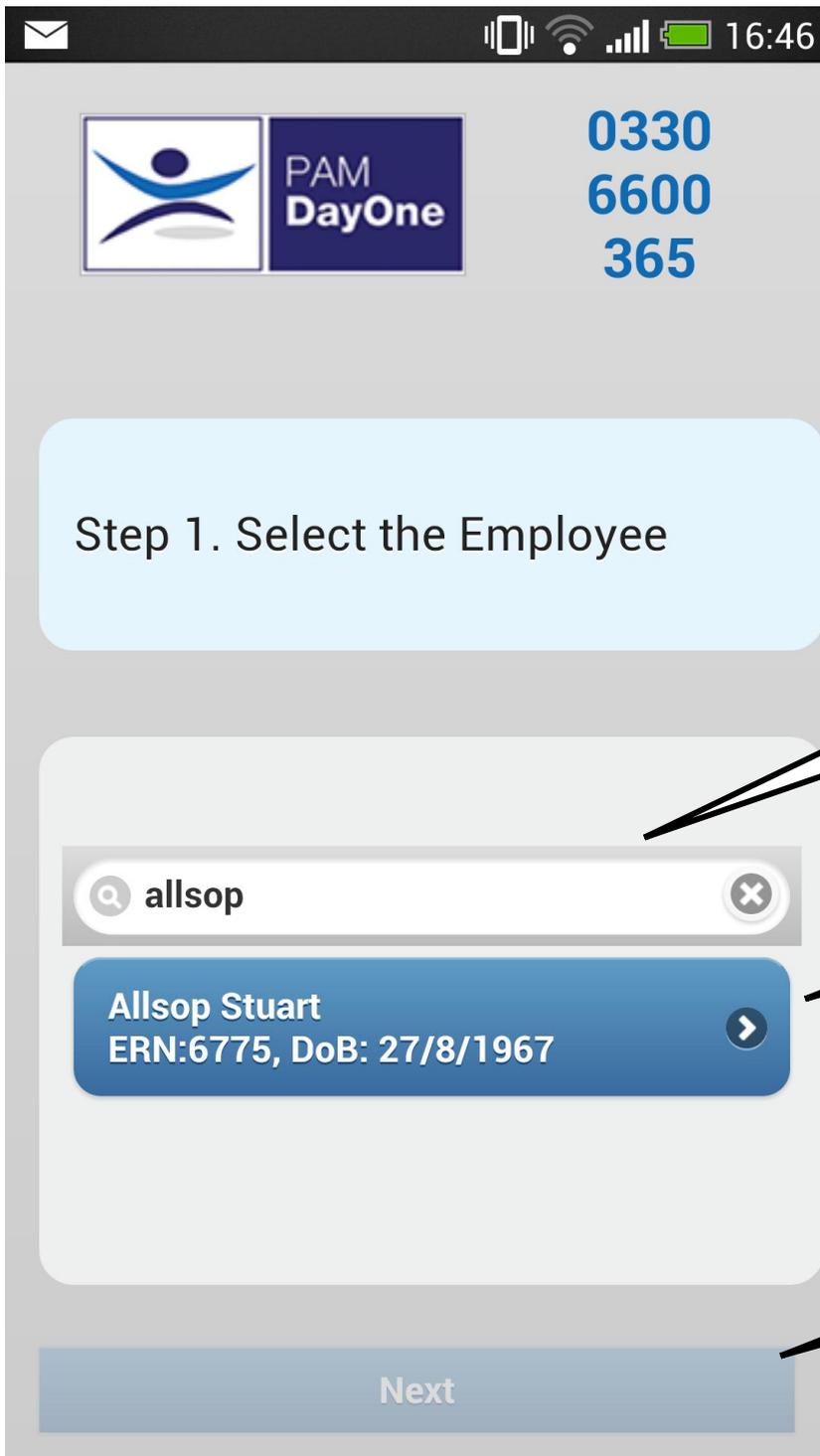
iPhone :

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



Type 4 or more characters of the employees surname and the predictive search will start to fill in the rest

Press to select the right person

Click Next

13:16

m.ohiosystems.co.uk/#/...

Welcome to PAM DayOne

Hello, Trotter Albert



0330
6600
365

Step 2. Fill out the Referral Form

Has the employee been advised a referral is being arranged?

Yes No

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

04/09/2013 13:16:33

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

When is the first day of absence?

What is the cause of absence?

Health

Non - Health

Muscular -
Skeletal

Can work place adjustments be accommodated?

Yes No

Can a late start be accommodated?

Yes No

Back

Next

Indicate the date the absence started

Choose the cause of absence

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

0330
6600
365

Step 3. Add comments if necessary:

Comments:

Back

Submit

Save Absence

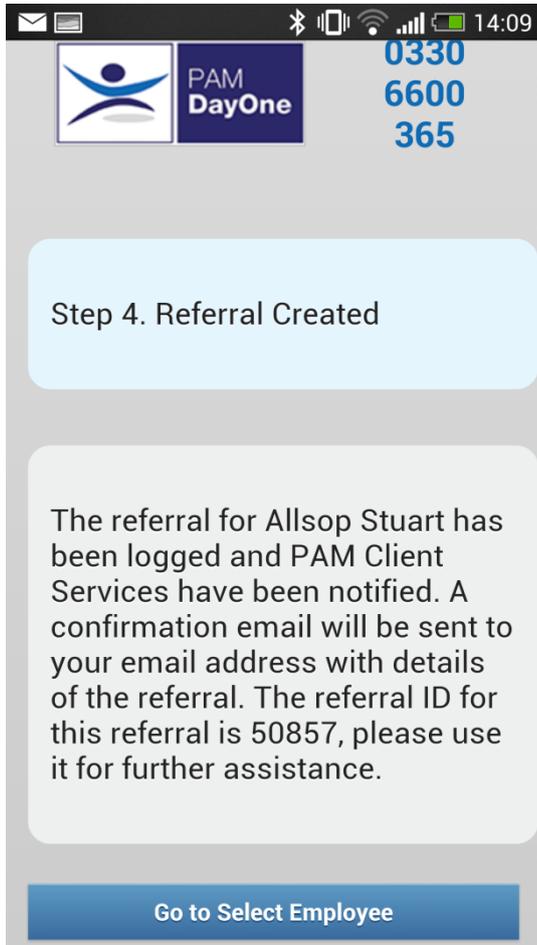
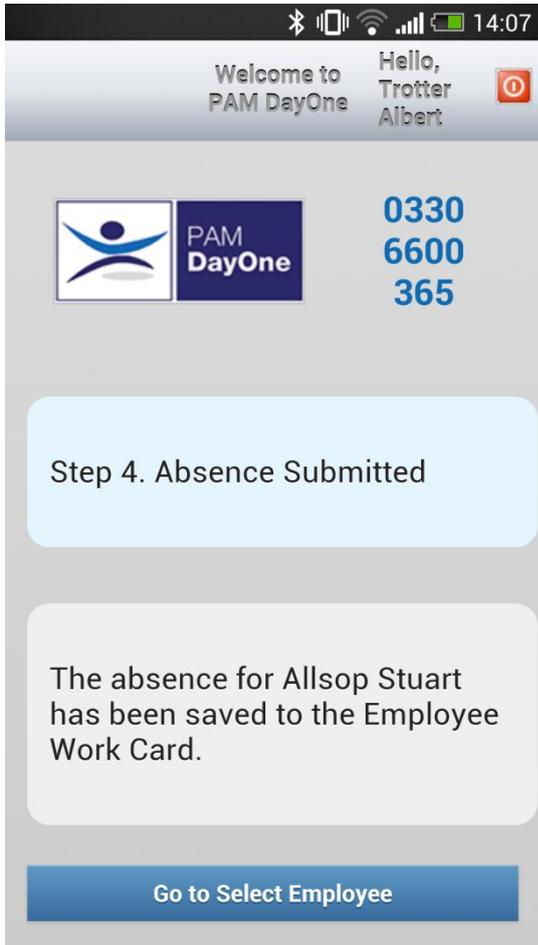
Provide as much supporting information as possible

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

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

OHIO Occupational Health Information Online
Add New Referral

Home Client Area PAM Service Reports Help

You are here: Home > Client Area > DAYONE > Add New Referral

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

Please search for the employee you wish to create the referral for using the search panel below.

Employee Name: DoB: Client Name:

Search Reset

Show 20 records per page.

ERN	Name	DoB	Town	County	Telephone	Mobile	Client	Action
6775	Allsop Stuart	27/07/1967	Manchester	Greater Manchester	01234567890	07999999999	Warrington Co (Distribution) Ltd	View Select
6784	Arnold John	29/07/1959	Stalybridge	Cheshire	01234567890	07999999999	Warrington Co (Distribution) Ltd	View Select
6788	Bedser Alec	08/07/1956	Manchester	Greater Manchester	01234567890	07999999999	Warrington Co Ltd	View Select
24652	Bucket Hyacinth	01/07/1952	High Hampton	Cheshire	01925999999		Warrington Co (Dist Admin) Ltd	View Select
6781	Bunting Jeffery	01/07/1961	Tameside	Greater Manchester	01234567890	07999999999	Warrington Co Ltd	View Select
6776	Butcher Jed	01/07/1961	Manchester	Greater Manchester	01234567890	07999999999	Warrington Co Ltd	View Select
6777	Byrne Stephen	01/07/1961	Widgollen	Clwyd	01234567890	07999999999	Warrington Co Ltd	View Select
6771	Dion Celine	01/07/1983	Manchester	Greater Manchester	01234567890	07999999999	Warrington Co (Dist Admin) Ltd	View Select

Search for the Employee using their

Click search

Click the 'select' link in the action column for the required Employee

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
DOB: 05/03/1962

20 Glover Drive Hyde
Tameside Greater Manchester SK14 1RT

Tel: 01234567890 / 07999999999
Email:

Client: Warrington Co Ltd
Department: Warehouse
Job Title: Operative

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 accommodated? * Yes No

Can a late start be accommodated? * Yes No

Comments:

PC

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**

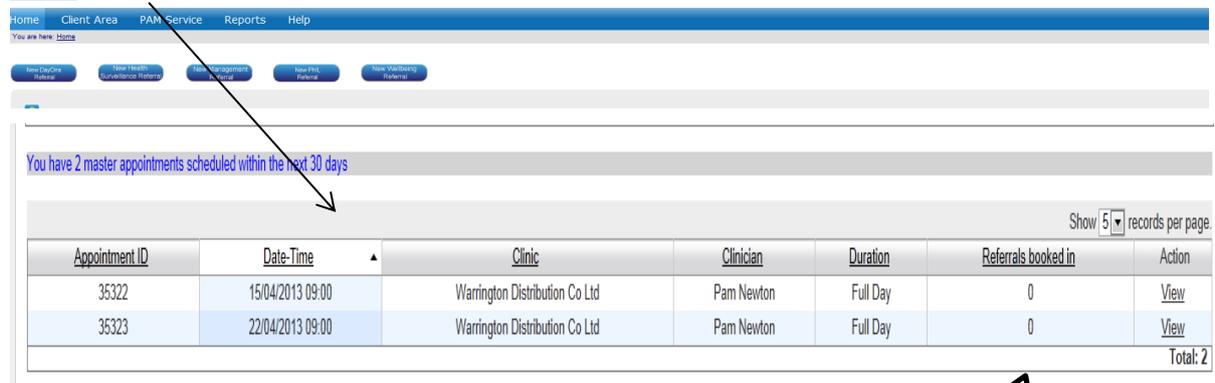
The referral for **Alec Bedser** has been logged and PAM DayOne have been notified.

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

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 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
35322	15/04/2013 09:00	Warrington Distribution Co Ltd	Pam Newton	Full Day	0	View
35323	22/04/2013 09:00	Warrington Distribution Co Ltd	Pam Newton	Full Day	0	View
Total: 2						

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.

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

The screenshot shows the 'Book Appointment' form in the PAM Service Client Area. The form is titled 'Step 1. Select Appointment Type > Step 2. Specify Appointment Details'. It includes fields for Client, Appointment Status, Is Master Appointment, Show Nearby Locations, Master Appointment ID, Reason for Appointment, Referral ID, Employee, Services Requested, Price, PO Number, Clinic, Clinician, Appointment Date, and Time. There are also 'Diary' and 'Check diary' buttons, a 'Comments' text area, and 'Cancel' and 'Continue' buttons at the bottom.

Callout 1 (Left): 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.*

Callout 2 (Top Right): Your location will appear. Select Booking Confirmed

Callout 3 (Middle Right): Choose from available dates. *If the date you require is missing please contact Client Services on 0845 643 5331*

Callout 4 (Bottom Right): Click "Diary" to see available appointment times. And enter the required Start time

Callout 5 (Bottom Center): 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.

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

ERN	Status	Name	Town	DoB	Job Title	Referring Manager	Telephone	Mobile	Action
6775	Live	Allsop Stuart	Manchester	27/09/1967	Operative	Trotter Albert	01234567890	07999999999	View Print
6784	Live	Arnold John	Stalybridge	29/08/1959	Operative	Trotter Albert	01234567890	07999999999	View Print
3978	Live	Hill Harry	Warrington	23/11/1981	Warehouse Operative	Trotter Albert	01942407049	07999999999	View Print
6782	Live	Holmes Andrew	Manchester	19/08/1961	Operative	Trotter Albert	01234567890	07999999999	View Print
6785	Live	Jacoby Derek	Manchester	23/01/1959	Operative	Trotter Albert	01234567890	07999999999	View Print
19121	Live	Jeans Terri	o	01/01/1950	test	Trotter Albert	01925222222		View Print
3976	Live	Jones John	Warrington	13/06/1991	FLT Operative	Trotter Albert	01942407049	07999999999	View Print

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

3 Click on ‘Consultation reports’

Personal Details:
 ERN: 3976
 Person ID:
 Title: Mr
 Gender: Male
 Forename: John
 Surname: Jones
 DoB: 13/06/1991

Employment Details:
 Client: Warrington Co (Distributi
 Department: Warehouse
 Job Title: FLT Operative
 Has Access To OHIO:

Contact Details:
 Address 1: Unit 123
 Address 2: Winwick Ind Est
 Town: Warrington
 Postcode: WA3 3SP
 County: Cheshire
 Telephone: 01942407049
 Mobile: 07999999999
 Email: ohioadmin@people-am.com

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

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

<u>Created On</u>	<u>Created By</u>	<u>Referral ID</u>	<u>Appt ID</u>	<u>File Name</u>
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

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	App 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 Requested: 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

Hide Comments

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

Comments:

Change appointment status to Withdrawn without Charge and click save.

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.

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.

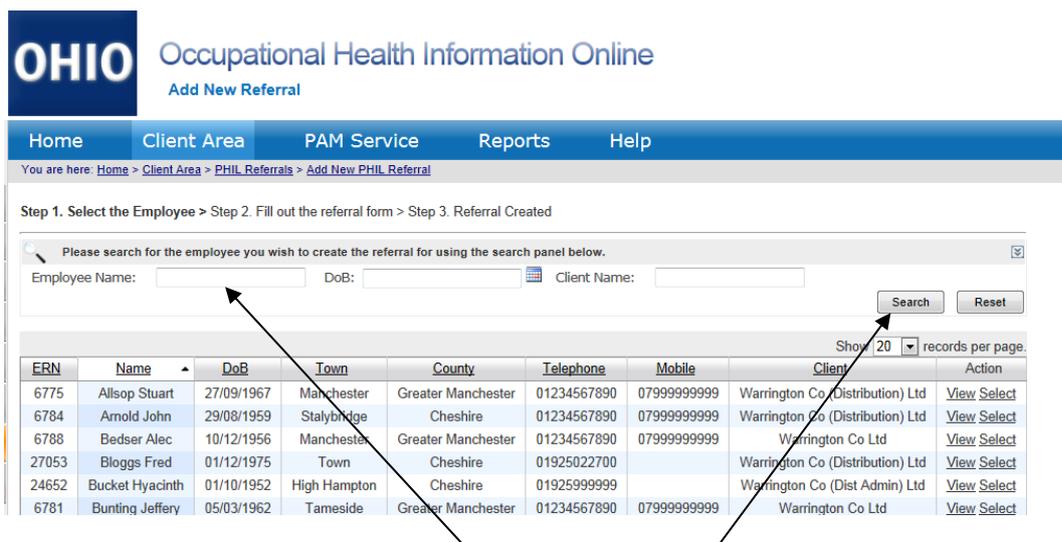
If you wish to cancel the whole day, please contact our Client Services and they will cancel this for you. Please note that any clinic cancelled within 14 days of the clinic date will be chargeable.

OHIO Support Line 0845 6435331

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

Home Client Area P Reports Help

You are here: Home > Client Area > PHIL Referrals

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: Win... Co (Dist Admin) Ltd Department: V... 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
--	---	---	--

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:

PO Number:

Back Cancel Continue

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

Add comments where necessary

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

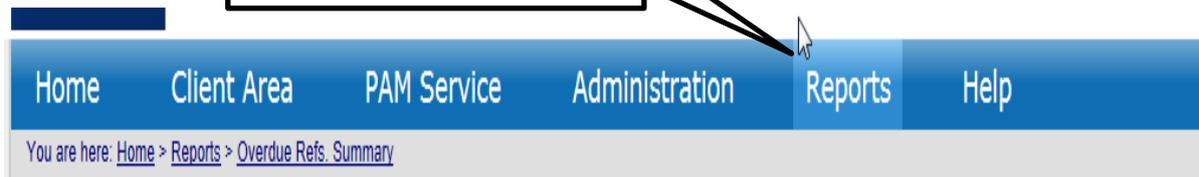
The referral for **Sidney Seed** has been logged and PAM Client Services have been notified. A confirmation email will be sent to your email address with details of the referral. The Referral ID for this referral is **23465**, please use it for further reference.

To Referral List Create New

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.

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

Export Page Export All

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:

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

OHIO Occupational Health Information Online
Welcome to OHIO!

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

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

Please search for the employee you wish to create the referral for using the search panel below.

Employee Name: DoB: Client Name:

Search Reset

Show 20 records per page.

ERN	Name	DoB	Town	County	Telephone	Mobile	Client	Action
6775	Allsop Stuart	27/09/1967	Manchester	Greater Manchester	01234567890	07999999999	Warrington Co (Distribution) Ltd	View Select
6784	Arnold John	29/08/1959	Stalybridge	Cheshire	01234567890	07999999999	Warrington Co (Distribution) Ltd	View Select
6788	Bedser Alec	10/12/1956	Manchester	Greater Manchester	01234567890	07999999999	Warrington Co Ltd	View Select
27053	Bloggs Fred	01/12/1975	Town	Cheshire	01925022700		Warrington Co (Distribution) Ltd	View Select
24652	Bucket Hyacinth	01/10/1952	High Hampton	Cheshire	01925999999		Warrington Co (Dist Admin) Ltd	View Select
6781	Bunting Jeffery	05/03/1962	Tameside	Greater Manchester	01234567890	07999999999	Warrington Co Ltd	View Select

Search for the employee by typing their surname and press Search

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

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

Home Client Area PAM Service Administration Reports Help

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

Referral Form - Hill Harry

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

Hill Harry
DOB: 23/11/1981

Unit 125 Winwick Ind Est
 Warrington Cheshire WA3 3SP

Tel: 01942407049 / 07999999999
 Email:

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

Are the employees personal details correct? **Yes** **No** Amend

Referral Details Step 2.1 About The Referral >

Reason for Referral:

Physiotherapy Assessment Physiotherapy assessment to provide advice
 Counselling Access to therapytreatment and assessment services

Has a stress risk assessment been carried out? **Yes** **No**

Service Required: Wellbeing F2F Assessment

Manager add comments
 add any further information here

Is Initial Assessment Available?

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

Do you require a post consultation briefing with our clinician? **Yes** **No** Managers contact number: *215

X Cancel < Back Continue >

You have the ability to correct colleagues' records

Select service required, Counselling or Physiotherapy

Leave blank

We actively encourage you to discuss referrals with our clinicians.

Tell us the best phone number to contact you on

Click "Continue" when all sections are completed.

Tip : Fields marked with * are mandatory

Step 2.2 About the Referral

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

Provide details about the colleague's & absence details

Help us to provide answers to your questions regarding the referral

Upload any further documents here

Once all fields have been completed click on Submit. The

 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.

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:

The screenshot shows the PAM Service web application interface. The top navigation bar includes 'Home', 'Client Area', 'PAM Service', 'Reports', and 'Help'. The breadcrumb trail indicates the current location: 'Home > Client Area > Employees'. A search form is visible with fields for Client, Employee Name, ERN, and Department, along with a 'Search' button. Below the search form is a table of employees with columns for ERN, Status, Name, Town, DoB, Job Title, Referring Manager, Telephone, Mobile, and Action. Callouts indicate the following steps:

2. Select Client Area, then drop down onto Employees
2. Enter surname & press Search
4. Click View

ERN	Status	Name	Town	DoB	Job Title	Referring Manager	Telephone	Mobile	Action
6775	Live	Allsop Stuart	Manchester	27/09/1967	Operative	Trotter Albert	01234567890	07999999999	View Print
6784	Live	Arnold John	Stalybridge	29/08/1959	Operative	Trotter Albert	01234567890	07999999999	View Print
6788	Live	Bedser Alec	Manchester	10/12/1956	FLT Driver	Trotter Albert	01234567890	07999999999	View Print
27053	Live	Bloggs Fred	Town	01/12/1975	TEster	Trotter Albert	01925022700		View Print
24652	Live	Bucket Hyacinth	High Hampton	01/10/1952	Lady of the House	Frost Jack	01925999999		View Print
6781	Live	Bunting Jeffery	Tameside	05/03/1962	Operative	Trotter Albert	01234567890	07999999999	View Print
6776	Live	Burke Ed	Manchester	16/03/1967	FLT Driver	Trotter Albert	01234567890	07999999999	View Print

You will then be taken to the “Employee Details” screen

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

Record Status...

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

Employment Details:
 Client: Warrington Co (Distribution) Lt
 Department:
 Job Title:
 Has Access To OHIO:

Contact Details:
 Address1: Unit 124
 Address2: Winwick Ind Est
 Town: Warrington
 Postcode: WA3 3SP
 County: Cheshire
 Telephone: 01942407049
 Mobile: 07999999999
 Email: ohioadmin@ohiosystems.co.uk

Referring Manager:
 Name: Frost Jack
 Title: Mr
 Job Title: Owner
 E-mail: jim.murphy@people-am.com
 Telephone: 01925999999
 Mobile: 07770654321

Cancel Print Report Save

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:

Home Client Area PAM Service Reports

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

General Details GP Details Managers HS Profile Consultation Reports Diary

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. Specify the date the nightworker questionnaire was completed

and set the due date for the following year

Health Assessment Type	Last Medical	Due Date	Guidance	Current Status
<input checked="" type="checkbox"/> Cholesterol Screening	22/03/2012	21/03/2013	N/A	Assigned
<input type="checkbox"/> FLT/Vocational Driver Medical (HS)		15/04/2013	N/A	Not assigned
<input checked="" type="checkbox"/> Freezer Worker Medical		18/04/2013	N/A	Assigned
<input type="checkbox"/> HEP B Booster		15/04/2013	N/A	Not assigned
<input type="checkbox"/> Hepatitis B Vaccination (Energix) HS		15/04/2013	N/A	Not assigned
<input checked="" type="checkbox"/> Lung Function - Spirometry HS		20/03/2013	N/A	Assigned
<input type="checkbox"/> Night Workers Questionnaire		15/04/2013	N/A	Not assigned
<input type="checkbox"/> Urinalysis		15/04/2013	N/A	Not assigned
<input type="checkbox"/> Vaccination Screening		15/04/2013	N/A	Not assigned
<input type="checkbox"/> Vision Screening HS		15/04/2013	N/A	Not assigned
<input type="checkbox"/> Workplace Medical		15/04/2013	N/A	Not assigned

Total: 11

Cancel Save

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

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

19 MI Reports

The screenshot displays the 'Overdue Referrals Summary Report' interface. The top navigation bar includes 'Home', 'Client Area', 'PAM Service', 'Administration', 'Reports', and 'Help'. The breadcrumb trail shows 'You are here: Home > Reports > Overdue Refs. Summary'. The search filters include 'Client: * Please select', 'Child Client:', 'Date:', and 'Referral Type: All'. A checkbox labeled 'Include child clients data' is present. The table below the filters is empty, with the message 'There are no records matching your criteria. Please modify your criteria.' Three callout boxes provide instructions: 'Select area to report on' points to the 'Client' dropdown, 'Drill down to lower levels if necessary' points to the 'Child Client' dropdown, and 'Select all lower levels by ticking this box' points to the 'Include child clients data' checkbox.

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.

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.