



StaffCareServices

OPAS G2

Management Referral – Manager Process Only

December 2024

Contents

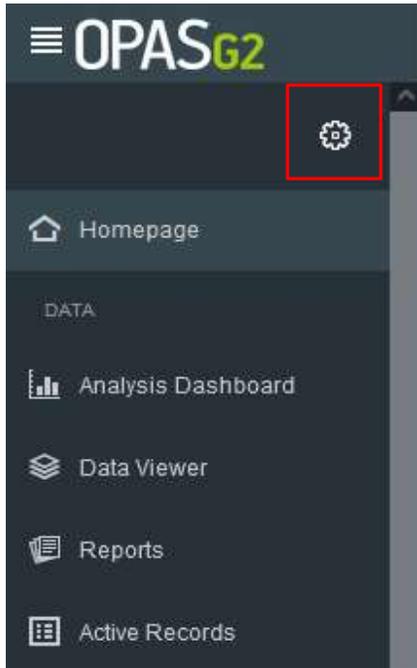
Introduction	3
Using the G2 System	4
Management Referrals	5
Creating a Referral	6
Consent	10
Pre-Consent	10
Status Updates as OH Progress the Referral	12
Receiving A Response from the OH Team	15
Copyright Notice:	17

Introduction

This guide will explain the following information:

- Using the OPAS G2 System
- Creating a Referral
- Consent process.

Using the G2 System



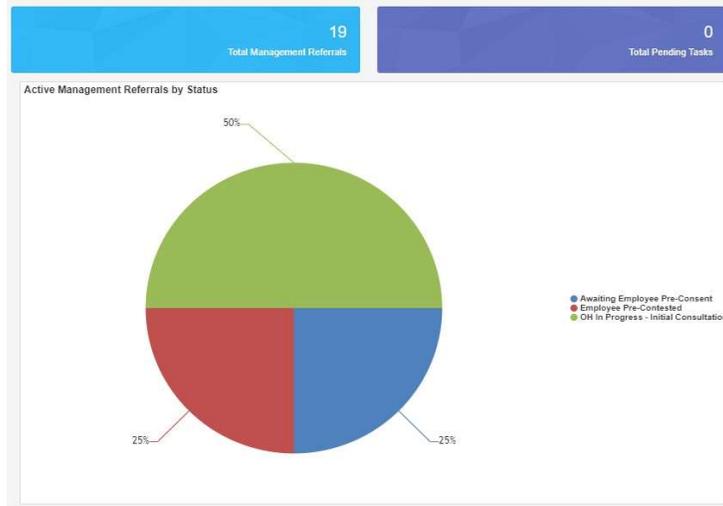
Use the Menu on the left-hand side as the main navigation through the system.

This user guide focuses on Management Referral from the Manager point of view.

Management Referrals

Log in using your provided login details.

Upon logging in, the Homepage will chart the Active Management Referrals you have open and their corresponding status



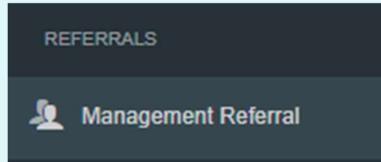
The right-hand side of the screen will show recent management Referrals.

Select the Referrals from here or select the **'Total Management Referrals'** blue panel at the top of the screen to show all of your referrals.

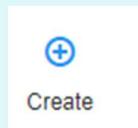
Active Management Referrals (3)			Name...	See more
Status Under OH Review	Employee John Woodwood	Triaged 11/01/2022		Open
Status OH In Progress - Initial Consultation	Employee Henrietta Owen	Triaged 13/01/2022		Open
Status OH In Progress - Initial Consultation	Employee Test Test	Triaged 25/01/2022		Open

Creating a Referral

From the Referrals Menu on the left-hand side select 'Management Referral'



Select 'Create' from the top right-hand side.



Complete all of the 'Referral Details'

The first section of the management referral form will ask about the referrer (you the manager). Please note the information will be automatically filled out based on the login being used.

Mandatory questions are signified with a red Asterix * and must be completed to allow progress through the form.

Details of the Referrer & Additional Contributors (0)

Details of the Referrer

Current information held about the Referrer associated with this record

Full Name	Employment Details
Bob Smith (CS86320)	Line Manager
Email Address	Telephone Number
g2.referrer@gmail.com	01312 117758

As this is yourself, if any of the details are incorrect, you can update them here [Update](#)

Additional Contributors such as HR can be added if needed, please note they will be able to see the final OH advice.

Additional Contributors

Adding personnel as additional contributors will grant them rights to edit this referral record as though they were the referrer. They will also be able to receive any specific communications that have been configured.

i Only personnel records with valid Manager or HR user accounts can be added
The details shown in the grid will be visible to all users granted access this record.

Enter the Name or Date of Birth of a person you wish to add as an additional contributor... [Add](#)

Name (Reference)	Employment Details	Email Address	Telephone Number
No additional contributors have been specified for this referral			

Next, the employee's details need to be added to the referral, along with the reason for referral, which you are able to select from the dropdown list provided.

Referral Details
PENDING

Employee Details

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

Given Name *	Family Name *
<input type="text"/>	<input type="text"/>
Date Of Birth	National Insurance Number
<input type="text" value="DD/MM/YYYY"/>	<input type="text"/>
Job Title *	Employment Location *
<input type="text"/>	<input type="text"/>
Email Address *	Telephone Number
<input type="text"/>	<input type="text"/>
Home Address	
<input type="text" value="Address input"/>	

Reason for Referral

Please select the referral type *

Scroll down and complete all sections relevant to the referral, working environment, absence details and Job Role Specifications, etc.

Finally complete the 'Advice required from Occupational Health' section, attach any required documents and complete the declaration.

Advice required from Occupational Health

Please select the questions from the list below which you wish the OH department to answer in regards to this referral.

Is the employee medically fit for their current role?

Yes No

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

Yes No

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

Yes No

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

Yes No

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

Yes No

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

Yes No

If there is a specific question that you wish to ask Occupational Health please add it here. Add Additional Question

Please note you do not have to select all the questions, just select yes to those which you require an answer to.

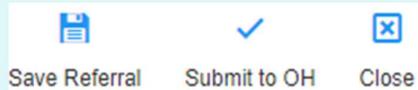
Additional questions can also be submitted using the **'Add Additional Questions'** button. Please note Each appointment is an hour's duration therefore any additional questions must be no more than FIVE to allow these to be answered within the allocated time.

The Manager must confirm if they have or don't have the employee consent For transparency the employee must be aware of the reasons for referral and have had sight of all referral documentation.

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

Once all sections are complete select **'Submit & request consent'** from the top right. This will send an email to the employee to gain their consent for the management referral process.

Note – the referral can be saved at any point using the save icon here.



Confirm submission of the Referral by selecting **'OK'**



Confirmation that the Management referral has saved will display.

The confirmation will also detail any automated communications that have been sent and which email address they have been sent to.

Management Referral Saved

 Continue



Management Referral Saved

The following actions and communications also occurred:

- Management Referral - Referrer has submitted a Referral Email was sent to g2.occhealth@gmail.com ✓
- Management Referral - Submitted To OH Email was sent to g2.referrer@gmail.com ✓

Select 'Continue'

The Management Referral Dashboard will display

Management Referral Dashboard Create

Filters

1 Recently Finished
2 Pending
3 Requires Further Information
4 **Awaiting OH Triage**
5 In Progress
6 Awaiting Consent
7 Awaiting Pre-Consent
8 Employee Pre-Contested
9 Archived

Awaiting OH Triage					1
These records have been submitted and are waiting to be reviewed by the OH team					
Submitted to OH	Employee Name	Referral Type		Actions	
11/01/2022 <small>13 days 23 hours ago</small>	John Woodwood	Fitness For Work		Open	
In Progress					2
These records are currently being processed by the OH team					
Accepted by OH	Employee Name	Current State	Referral Type	Actions	
13/01/2022 <small>12 days 5 hours ago</small>	Hennietta Owen	Awaiting Initial Consultation	Fitness For Work	Open	
25/01/2022 <small>9 days 4 hours ago</small>	Test Test	Awaiting Initial Consultation	Support To Remain At Work	Open	
Awaiting Consent					Expand to calculate total 3
These are referrals awaiting the employee's consent					
Awaiting Pre-Consent					Expand to calculate total 4
These are referrals awaiting the employee's pre-consent					
Employee Pre-Contested					Expand to calculate total 5
These are referrals awaiting changes due to the employee contesting the referral					
Archived					Expand to calculate total 6
These are historic referrals which have finished and you have reviewed					

The submitted Referral will now display under 'Awaiting OH Triage'.

The progress of the submission can be monitored using the blue bars

Management Referrals can be deleted after submission. However, they cannot be deleted once OH triage the submission.

Consent

Pre-Consent

Pre-consent is a feature when the Referrer has completed the referral, an email will be sent to the employee asking for their consent for the referral process.

It is only when the employee gives their consent that the referral arrive with the OH department.

Pre-Consent On Off

This feature enables the ability for an employee to consent to a management referral before being passed to OH.

Once a manager has completed the referral form there will be an option to **'Submit & Request Consent'**

 Save Referral  Submit & request consent  Close

A notification will show the email address used to send consent to the employer to gain consent.

Management Referral Saved

 Continue



Management Referral Saved

The following actions and communications also occurred:

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

In the Management Referral Dashboard, the referral will now be marked as **“Awaiting Pre-Consent”**

Awaiting Pre-Consent		These are referrals awaiting the employee's pre-consent		
Requested Consent	Employee Name	Referrer Name	Referral Type	Actions
28/01/2022 01:52 PM	Bob Smith	Leah Birchall	Frequent Short Term Sickness Absence	Open

The Employee will now receive an email asking for their consent

Status Updates as OH Progress the Referral

As the referral is progressed by the OH Team the status of the referral will update. You will not be able to see any clinical information, but you will be able to see a timeline of events.

Select either of the **'Management Referrals'** options from the homepage



The **Management Referral Dashboard** will display.

Management Referral Dashboard Create

Filters

4 Recently Finished
0 Pending
0 Requires Further Information
0 Awaiting OH Triage
6 In Progress
0 Awaiting Consent
0 Awaiting Pre-Consent
0 Employee Pre-Contested
0 Archived

Recently Finished 4
These records have recently been finished by the OH team and are ready for you to review

Completed	Status	Employee Name	Referral Type	Actions
25/07/2021 <small>197 days 12 hours ago</small>	Complete	Jayce Neric	Long Term Sickness Absence	Open
23/08/2021 <small>162 days 23 hours ago</small>	Complete	Virgil Rayben	Frequent Short Term Sickness Absence	Open
29/11/2021 <small>71 days 2 hours ago</small>	Complete	Danica Longstone	Returning To Work	Open
16/12/2021 <small>53 days 11 hours ago</small>	Complete	Linda Brem	Long Term Sickness Absence	Open

In Progress 6
These records are currently being processed by the OH team

Accepted by OH	Employee Name	Current State	Referral Type	Actions
21/12/2021 <small>49 days 9 hours ago</small>	Alexia Rosselerin	Ongoing	Work Related Ill Health	Open
22/12/2021 <small>47 days 11 hours ago</small>	Norbert Redmore	Awaiting Initial Consultation	Long Term Sickness Absence	Open
03/01/2022 <small>35 days 15 hours ago</small>	Josiah Springham	Ongoing	Frequent Short Term Sickness Absence	Open
10/01/2022 <small>28 days 12 hours ago</small>	Wm Bolgard	Awaiting Initial Consultation	Fitness For Work	Open

You can see the status of any referral in the corresponding section

Awaiting OH Triage 1
These records have been submitted and are waiting to be reviewed by the OH team

Submitted to OH	Employee Name	Referral Type	Actions
14/01/2022 <small>24 days 17 hours ago</small>	Ayla Greate	Work Related Injury	Open

Or use the filters to narrow down the number of referrals you have submitted by reason or type.



Referral Type

None selected

Search

- Fitness For Work
- Frequent Short Term Sickness Absence
- Long Term Sickness Absence
- Returning To Work
- Support To Remain At Work

Status

None selected

Search

- Pending
- Awaiting Review
- Awaiting OH Triage
- Awaiting Further Information
- Resubmitted for OH Triage

To review more details, select to **'OPEN'** a referral

Actions

Open

The status will display at the top of the page

You can review the details originally submitted on the left of the page.

☰ Current Status: **Under OH Review** [\(More Info\)](#)

Details of the Referrer & Additional Contributors (0)

Details of the Referrer

Current information held about the Referrer associated with this record

<p>Full Name</p> <p>Bob Smith (CS86320)</p>	<p>Employment Details</p> <p>Line Manager</p>
<p>Email Address</p> <p>g2.referrer@gmail.com</p>	<p>Telephone Number</p> <p>01312 117758</p>

As this is yourself, if any of the details are incorrect, you can update them here

Update

A timeline of events will show down the right-hand side of the page. This will update LIVE as appointments are added and completed.

Additional Information ⓘ

☰ Referral Activity 📄 Documents (0) 🗨️ Communications

[Send Message](#)

Sat 15th Jan 2022 10:52	🔍 Triaged - Under Review Teresa Rushden (CS10030)
Sat 15th Jan 2022 10:25	👤 Employee Details Validated Teresa Rushden (CS10030)
Fri 14th Jan 2022 16:23	📄 Submitted To OH Bob Smith (CS88320)

Receiving A Response from the OH Team

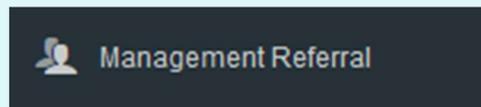
Whenever a consultation is completed, and a corresponding update is completed to be shared with you as the referrer, this will be done via the application submitted.

Please Note - This is pending Employee Consent being provided to share the report.

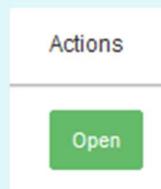
When a response/report is ready you will be notified by email. This will confirm the name of the employee and that a report is ready. No further information will be shared.

The referral may appear in the **'Recent Referrals'** on the home page

If not select **'Management Referrals'**



From the Dashboard select to **'Open'** the corresponding referral. This should be under **'Recently Completed'**



The timeline will show the referral is completed.

Additional Information i

☰
Referral Activity

📄
Documents (0)

📧
Communications

Send Message

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

The main body of the page will display the original referral AND an OH advice section.

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

The OH Team will have answered the questions you requested and provided any further relevant information.

OH Advice COMPLETE ▾

Is the employee medically fit for their current role?

The employee is fit to continue with their normal duties

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

Any detailed adjustments required will be detailed in this box below.

Referral Outcome

Outcome

Fit ▾

Details of any required Adjustments and/or Restrictions

Adjustment / Restriction	Details
No adjustments or restrictions entered	

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