



CIVICA

## OPAS G2

Management Referral – Manager Process Only

January 2022

## 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
Interim Updates.....	17
Document Control .....	18
Copyright Notice:.....	18

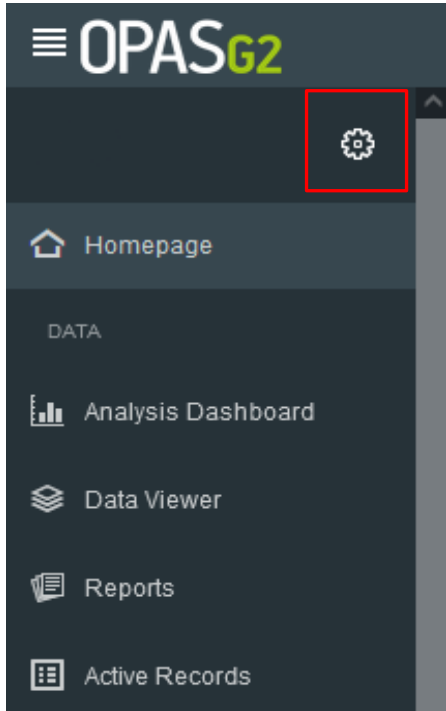
## Introduction

This guide is to details how a user of the OPAS G2 uses Management Referral Configuration in G2.

The guide will explain the following information:

- Using the G2 System
- Creating a Referral
- Consent

## Using the G2 System



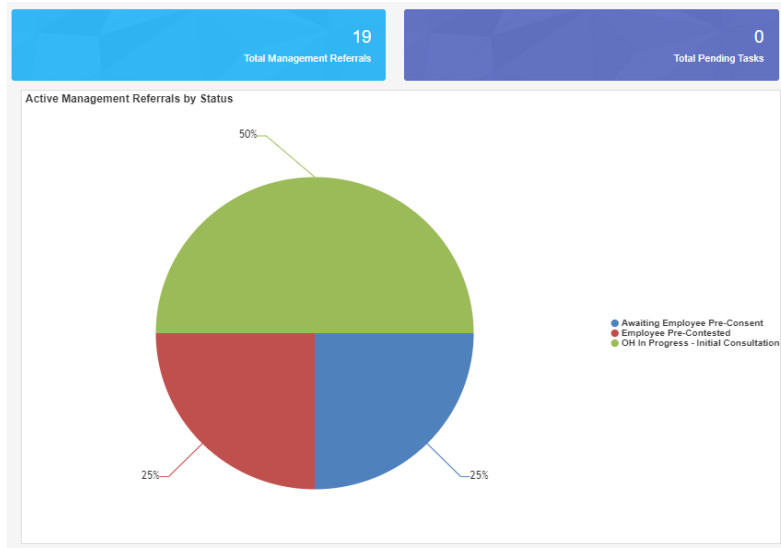
Use the Menu on the left-hand side as the main navigation through the system.

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

## Management Referrals

Log in as a Manager

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

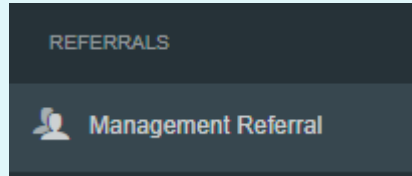


The right-hand side of the screen will show recent management Referrals. Select the Referrals from here or select the 'Total Management Referrals' blue panel at the top of the screen to show all of your referrals.

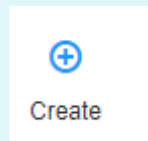
Active Management Referrals (3)			Name...	<a href="#">See more</a>
Status Under OH Review	Employee John Woodwood	Triaged 11/01/2022		Open
Status OH In Progress - Initial Consultation	Employee Henrietta Owen	Triaged 13/01/2022		Open
Status OH In Progress - Initial Consultation	Employee Test Test	Triaged 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 will ask about the referrer. Please note the information will be automatically filled out with the login being used.

Mandatory questions are signified with a red Asterix \*

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 can be added if needed, they will need 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.

Referral Details
PENDING

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**Employee Details**

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

Given Name *	Family Name *
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Date Of Birth	National Insurance Number
<input style="width: 95%;" type="text" value="DD/MM/YYYY"/>	<input style="width: 95%;" type="text"/>
Job Title *	Employment Location *
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Email Address *	Telephone Number
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Home Address	
<input style="width: 95%;" 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.

Finally complete the 'Advice required from Occupational Health', 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

The user does not have to select all the questions but just select yes to those which require an answer to.

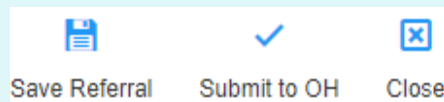
Additional questions can also be submitted using the **'Add Additional Questions'** button.

The Manager must confirm if they have or don't have the employee consent

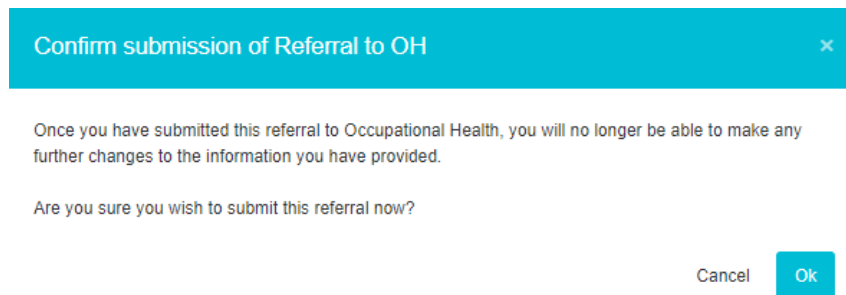
Do you have the employees consent for Occupational Health to contact them regarding this referral? \*

Once all sections are complete select **'Submit to OH'** from the top right.

**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.



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

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Filters

8 Recently Finished
0 Pending
0 Requires Further Information
1 Awaiting OH Triage
2 In Progress
0 Awaiting Consent
0 Awaiting Pre-Consent
0 Employee Pre-Contested
0 Archived

Awaiting OH Triage				
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 13 days 23 hours ago	John Woodwood		Fitness For Work	<a href="#">Open</a>

In Progress				
These records are currently being processed by the OH team				
Accepted by OH	Employee Name	Current State	Referral Type	Actions
13/01/2022 12 days 0 hours ago	Henrietta Owen	Awaiting Initial Consultation	Fitness For Work	<a href="#">Open</a>
25/01/2022 0 days 4 hours ago	Test Test	Awaiting Initial Consultation	Support To Remain At Work	<a href="#">Open</a>

Awaiting Consent		These are referrals awaiting the employee's consent		Expand to calculate total
Awaiting Pre-Consent		These are referrals awaiting the employee's pre-consent		Expand to calculate total
Employee Pre-Contested		These are referrals awaiting changes due to the employee contesting the referral		Expand to calculate total
Archived		These are historic referrals which have finished and you have reviewed		Expand to calculate total

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 that can be turned on or off in the G2 system. If Pre-consent is turned on when the Referrer has completed the referral, an email will be sent to the employee asking for their consent.

Its only when the employee gives their consent will the referral arrive with the OH department.


Pre-Consent can only be turned on or off by a Administrator

**Pre-Consent**  On  Off


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

Once turned on by the Administrator, when a Manager completes the Referral form they will no longer see an option to send to OH.


Instead, the option will be to **'Submit & Request Consent'**



Save Referral



Submit & request consent



Close

A notification will show an email has been sent to 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	<a href="#">Open</a>

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

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Filters

4 Recently Finished 0 Pending 0 Requires Further Information 0 Awaiting OH Triage 0 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 Noric	Long Term Sickness Absence	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">Open</span>
23/08/2021 <small>168 days 23 hours ago</small>	Complete	Virgil Rayben	Frequent Short Term Sickness Absence	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">Open</span>
29/11/2021 <small>71 days 2 hours ago</small>	Complete	Danica Longstone	Returning To Work	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">Open</span>
16/12/2021 <small>53 days 11 hours ago</small>	Complete	Linda Brem	Long Term Sickness Absence	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">Open</span>

In Progress 4

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 8 hours ago</small>	Alexia Rosselerin	Ongoing	Work Related Ill Health	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">Open</span>
22/12/2021 <small>47 days 11 hours ago</small>	Norbert Redmore	Awaiting Initial Consultation	Long Term Sickness Absence	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">Open</span>
03/01/2022 <small>35 days 15 hours ago</small>	Josiah Springham	Ongoing	Frequent Short Term Sickness Absence	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">Open</span>
10/01/2022 <small>28 days 12 hours ago</small>	Wm Bolgard	Awaiting Initial Consultation	Fitness For Work	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">Open</span>

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	<span style="background-color: #4CAF50; color: white; padding: 2px 5px;">Open</span>

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



**Referral Type**

None selected

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

**Status**

None selected

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

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

**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

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

*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 i

**Referral Activity**      Documents (0)      Communications

[Send Message](#)

Sat 15th Jan 2022 10:52	<b>⚙️ Triaged - Under Review</b> Teresa Rushden (CS10030)
Sat 15th Jan 2022 10:25	<b>👤 Employee Details Validated</b> Teresa Rushden (CS10030)
Fri 14th Jan 2022 16:23	<b>📄 Submitted To OH</b> Bob Smith (CS86320)

## Receiving A Response from the OH Team

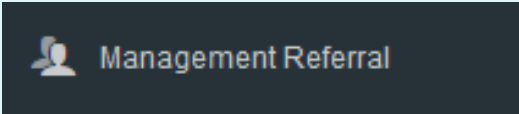
Whenever a consultation is completed, and a corresponding update is completed to be shared with you as the referrer, this will be done via the application.

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

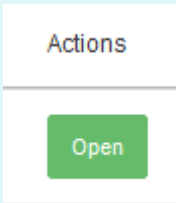
When a response/report is ready you will be notified by email. This will confirm the name of the employee and that a report is ready. No further information will be shared.

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.

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Additional Information

Referral Activity

Documents (0)

Communications

Send Message

Sun 18th Jul 2021 16:23	<b>Employee gave consent for their manager to see the OH advice</b> Brendon Winneconnett (CS105132)
Fri 16th Jul 2021 04:27	<b>Employee consent requested</b> Rebecca Hyden (CS10026)
Wed 7th Jul 2021 03:07	<b>Employee Details Validated</b> Rebecca Hyden (CS10026)
Mon 5th Jul 2021 23:58	<b>Submitted To OH</b> 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, 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?

And detailed any adjustments required

### Referral Outcome

Outcome

Fit ▾

Details of any required Adjustments and/or Restrictions

Adjustment / Restriction	Details
No adjustments or restrictions entered	



## Interim Updates

If the referral is still ongoing, but the OH Team wish to provide an interim update the same process as above will apply.

An email will be received confirming a response has been provided.

### OPAS-G2

Dear Mr Smith,

The Management Referral record for Heath Woodson has an interim update.

Please login to the system to view the Management Referral record and see the interim update provided by the OH department.

If you have any queries please contact us.

Yours sincerely,

Occupational Health Department

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Log in and open the record as details above, under the 'In Progress' section of the **Management Referral Dashboard**

<span>📌 In Progress</span> <span>These records are currently being processed by the OH team</span> <span>10</span>				
Accepted by OH	Employee Name	Current State	Referral Type	Actions
03/02/2022 4 days 21 hours ago	Bob Richardson	Awaiting Initial Consultation	Returning To Work	<a href="#">Open</a>
08/02/2022 0 days 0 hours ago	Samantha Sandwel	Awaiting Initial Consultation	Returning To Work	<a href="#">Open</a>
08/02/2022 0 days 0 hours ago	Heath Woodson	Ongoing with Interim Update <span>🚩</span>	Fitness For Work	<a href="#">Open</a>

The Interim Updates will have the current state of 'Ongoing with Interim Update' and will have a 🚩  
Click 'Open'

This provides the same information as the OH Advice detailed above but is an Interim report. The Referral is ongoing and the OH Team may yet have further consultations or actions with the employee

## Document Control

Document Control:				
Version:	Author:	Date:	Comments:	Status:
1.0	Jonathan Sidaway	14/01/2022		

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