

West Suffolk NHS Foundation Trust Managers Guide to Management Referrals

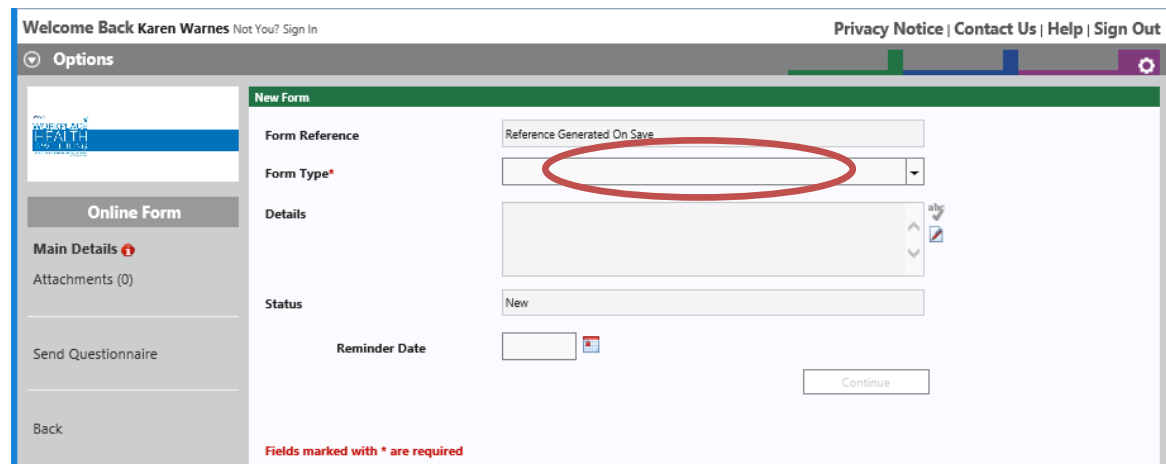
You will need a Workplace Health & Wellbeing (WHWB) portal account to submit management referrals. If you do not have an account please go to the setting up an account document.

1. Login into the Portal Home Page: <https://nnuh.eopas.co.uk>
2. Select 'Create New Online Form'



The screenshot shows the 'Create New Online Form' page. On the left, under 'Options', the 'Create New Online Form' button is circled in red. The main area shows a table with columns: Form Type, Ref, Name: Given Na..., Name: Family Na..., Status, and Date Created. A table with 0 records is displayed. On the right, there is an 'Online Form Help' section with navigation instructions.

3. Pick to complete a Management Referral form from the Form Type drop down list



The screenshot shows the 'New Form' page. The 'Form Type' dropdown menu is circled in red. The page includes fields for 'Form Reference', 'Form Type*', 'Details', 'Status', and 'Reminder Date'. A 'Continue' button is at the bottom right. A note at the bottom states: 'Fields marked with * are required'.

4. Before completing the referral form:

Before submitting your completed referral form ensure that you have spoken with the employee, they should agree to the referral and understand what you hope to gain from the process.

Tips:

- This form has multiple pages for you to navigate through, use the Next Page and Previous Page options to return to a previous pages or go forwards
- Please only attach documents that are supplementary and relevant to the referral
- Any fields marked with an asterisk are compulsory
- As you complete the form it will autosave
- Fill in all of the details requested within the pages by either entering free text or selecting the relevant options
- Click on the box containing a pencil to enlarge the free type box. Alternatively, freetype your text into a word document and then cut and paste into the relevant free type box

5. Questions 1 to 18 (3 screens) - Employee Details

Welcome Back Karen Warnes Not You? Sign In

Privacy Notice | Contact Us | Help | Sign Out

Options

Online Form

Main Details

Assignment

Fill Out The Form

Attachments (0)

Send Questionnaire

Back

Norwich City Council Management Referral

Form Progress

1 to 13 14 to 18

1. Title *

2. Surname *

3. First Names *

4. Date of Birth *

5. Home Address *

6. Home Telephone *

7. Mobile Telephone *

8. Work telephone

9. Organisation/ Company * Norwich City Council

10. Email Address *

11. Dept / Work Location *

12. Job Title / Occupation *

13. Is the role full time or part time hours? *

Previous Page Next Page

Online Form Help

Online Forms

To fill out the loaded online form, choose the **Fill Out The Form** option. Progress can be monitored using the **Form Progress** option on the right hand side. Use the **Next** and **Previous** buttons to move around the form. Mandatory fields are marked in red.

Forms can be saved for completion at a later stage by choosing the **Save Form** option, or can be submitted if ready by choosing the **Complete** option.

Assignment

If authorised, forms can be assigned to someone else to complete by clicking on the **Assigned Person** button. Enter the details of the person required to complete the form.

Determine the assignees rights to the form using the **Status** field and what access to documents they have using the **Document Rights** field. Choose whether to notify the nominated individual by email using the **Send Notification Email** option.

You can retain access to non pre-placement forms and receive notification of their completion using the **Review Form When Completed** and **Receive Notification When Completed** options.

Attachments

If authorised, supporting documentation can be attached to the form using this option. Choose **Create New** to attach a new file - existing files are displayed initially. Use the **Browse** button to select an existing file.

Provided by Warwick International Computing Systems Ltd © 2006 - 2021 All rights reserved. Registered in England & Wales as: Warwick IC Systems Limited. Company Reg. No. 2877208

WARWICK INTERNATIONAL

- Please be sure to provide accurate and the latest information, checking with the employee if necessary

6. Questions 1 to 10 (2 screens) - Reason For Referral

Reason for Referral

1. Short Term Sickness Absence Yes ☐ No ☐

2. Long Term Sickness Absence Yes ☐ No ☐

3. Concern regarding fitness in current position Yes ☐ No ☐

4. Report after an accident / injury sustained at work Yes ☐ No ☐

5. Performance Deterioration Yes ☐ No ☐

6. Other (please specify) Details Yes ☐ No ☐

7. Absence Details

8. Why are you making this referral - Please provide comprehensive and relevant information / concerns regarding the reason for referral (NB: all the information on this form may be discussed with / shown to the individual employee) *

9. Are there any ongoing disciplinary / performance issues with this individual? If yes - please provide an outline* Details Yes ☐ No ☐

10. Do they normally perform at a satisfactory level Yes ☐ No ☐

- Questions 1-6 Indicate yes for at least 1 of these
- Question 7 Provide absence details relevant to the referral (either free text or use attachment)
- Question 8 and 9 If you have this information on separate document/s please cut and paste the information into the relevant field

7. Questions 1 to 8 (2 screens) – Would you like the assessment to answer the following questions?

Would you like the assessment to answer the following questions?

1. Are multiple short term sickness absences related to a single underlying health condition? Yes ☐ No ☐

2. Any work/study related concerns or issues? Yes ☐ No ☐

3. When is this person likely to be able to return to work/study activities? Yes ☐ No ☐

4. When is this period of sickness absence likely to end? Yes ☐ No ☐

5. Would restricted activities/phased return to work/study be recommended? Yes ☐ No ☐

6. If permanent re-deployment is an option in your organisation - would you like advice as to whether this may allow a return to work/study? Yes ☐ No ☐

7. Would you like the assessment to answer the following questions? Yes ☐ No ☐

8. Would you like the assessment to answer the following questions? Yes ☐ No ☐

Welcome Back Karen Warnes Not You? Sign In

Privacy Notice | Contact Us | Help | Sign Out

Options

Norwich City Council Management Referral

Would you like the assessment to answer the following questions?

1 to 6 7 to 8

7. If ill health retirement is an option for this individual would you like advice on whether an application for ill health retirement should be considered? Yes ☐ No ☐

8. If you have any additional questions please clearly list them numerically i.e. Q1, Q2

< Previous Page Next Page >

Fields marked with * are required

Form Progress

Online Form Help

Online Forms

To fill out the loaded online form, choose the **Fill Out The Form** option. Progress can be monitored using the **Form Progress** option on the right hand side. Use the Next and Previous buttons to move around the form. Mandatory fields are marked in red.

Forms can be saved for completion at a later stage by choosing the **Save Form** option, or can be submitted if ready by choosing the **Complete** option.

Assignment

If authorised, forms can be assigned to someone else to complete by clicking on the **Assigned Person** button. Enter the details of the person required to complete the form.

Determine the assignees rights to the form using the **Status** field and what access to documents they have using the **Document Rights** field. Choose whether to notify the nominated individual by email using the **Send Notification Email** option.

You can retain access to non pre-placement forms and receive notification of their completion using the **Review Form When Completed** and **Receive Notification When Completed** options.

Attachments

If authorised, supporting documentation can be attached to the form using this option. Choose **Create New** to attach a new file - existing files are displayed initially. Use the **Browse** button to select an existing file.

- Questions 1-6 Indicate all that you would like addressed during the appointment
- Question 7 Would you like an informal/preliminary opinion as to whether ill health retirement may apply
- Question 8 If you have additional questions please list them here

8. Questions 1 to 9 (2 screens) – Manager Information

Welcome Back Karen Warnes Not You? Sign In

Privacy Notice | Contact Us | Help | Sign Out

Options

Norwich City Council Management Referral

Manager Information

Form Progress

1 to 6 7 to 9

1. Name of Manager *

2. Job Title / Occupation *

3. Contact Email *

4. Manager Telephone *

5. HR Officer supporting manager

6. HR Officer email

< Previous Page Next Page >

Fields marked with * are required

Online Form Help

Online Forms

To fill out the loaded online form, choose the **Fill Out The Form** option. Progress can be monitored using the **Form Progress** option on the right hand side. Use the Next and Previous buttons to move around the form. Mandatory fields are marked in red.

Forms can be saved for completion at a later stage by choosing the **Save Form** option, or can be submitted if ready by choosing the **Complete** option.

Assignment

If authorised, forms can be assigned to someone else to complete by clicking on the **Assigned Person** button. Enter the details of the person required to complete the form.

Determine the assignees rights to the form using the **Status** field and what access to documents they have using the **Document Rights** field. Choose whether to notify the nominated individual by email using the **Send Notification Email** option.

You can retain access to non pre-placement forms and receive notification of their completion using the **Review Form When Completed** and **Receive Notification When Completed** options.

Attachments

If authorised, supporting documentation can be attached to the form using this option. Choose **Create New** to attach a new file - existing files are displayed initially. Use the **Browse** button to select an existing file.

- Questions 1-4 Please provide your details here
- Questions 5-6 If you provide an HR Officer details he/she will also receive a copy of the report
- Questions 7-8 All reports are sent via email. Postal reports are only sent in exceptional circumstances

9. Questions 1 to 4 (1 screen) – Declaration

Welcome Back Karen Warnes Not You? Sign In Privacy Notice | Contact Us | Help | Sign Out

Options

Norwich City Council Management Referral

Declaration

1. I can confirm that the individual has been made fully aware of this referral and it's purpose.* Yes ☐ No ☐

2. I can confirm that the staff member has consented to this referral Yes ☐ No ☐

3. I understand that under the General Data Protection Regulation (GDPR) employees may request access to their occupational health records Yes ☐ No ☐

4. Please be aware that the individual may request to view the report prior to the release to yourself. We will inform you if this occurs but it may result in a delay in the release of the report. Yes ☐ No ☐

< Previous Page Send Questionnaire

Fields marked with * are required

Form Progress

Online Form Help
Online Forms

To fill out the locked online form, choose the **Fill Out The Form** option. Progress can be monitored using the **Form Progress** option on the right hand side. Use the Next and Previous buttons to move around the form. Mandatory fields are marked in red.

Forms can be saved for completion at a later stage by choosing the **Save Form** option, or can be submitted if ready by choosing the **Complete** option.

Assignment

If authorised, forms can be assigned to someone else to complete by clicking on the **Assigned Person** button. Enter the details of the person required to complete the form.

Determine the assignees rights to the form using the **Status** field and what access to documents they have using the **Document Rights** field. Choose whether to notify the nominated individual by email using the **Send Notification Email** option.

You can retain access to non pre-placement forms and receive notification of their completion using the **Review Form When Completed** and **Receive Notification When Completed** options.

Attachments

If authorised, supporting documentation can be attached to the form using this option. Choose **Create New** to attach a new file - existing files are displayed initially. Use the **Browse** button to select an existing file.

- Question 2 WHWB will also obtain consent during the appointment

You have completed the referral form and it can now be submitted to WHWB for processing by choosing to send the questionnaire

10. Do you wish to set this Form as complete?

Welcome Back Karen Warnes [Not You?](#) [Sign In](#) [Privacy Notice](#) [Contact Us](#) [Help](#) [Sign Out](#)

Options

Workplace Health & Wellbeing

Online Form

Main Details

Assignment

Fill Out The Form

Attachments (0)

Send Questionnaire

Back

Harwich City Council Management Referral

Declaration

1. I can confirm that the individual has been made fully aware of this referral and its purpose. Yes ☐ No ☐

2. I can confirm that the staff member has consented to this referral. Yes ☐ No ☐

3. I understand that under the General Data Protection Regulation (GDPR) employees may request access to their occupational health records. Yes ☐ No ☐

4. Please be aware that the individual may wish to view the report prior to the release of the report. We will inform you if this occurs. Yes ☐ No ☐

Message ID (1575)

Do you wish to set this Form as completed?

Note: Once set as completed, the Form will be sent to Workplace Health & Wellbeing and cannot be updated in the future. Please ensure that you have added your contact number to the form as the Occupational Health team may need to contact you if further information is required.

Yes No

< Previous Page Send Questionnaire

Fields marked with * are required

Online Form Help

Online Forms

To fill out the loaded online form, choose the **Fill Out The Form** option. Progress can be monitored using the **Form Progress** option on the right hand side. Use the **Next** and **Previous** buttons to move around the form. Mandatory fields are marked in red.

Forms can be saved for completion at a later stage by choosing the **Save Form** option, or can be submitted if ready by choosing the **Complete** option.

Assignment

If authorised, forms can be assigned to someone else to complete by clicking on the **Assigned Person** button. Enter the details of the person required to complete the form.

Determine the assigned rights to the form using the **Status** field and what access to documents they have using the **Document Rights** field. Choose whether to notify the nominated individual by email using the **Send Notification Email** option.

You can retain access to non pre-placement forms and receive notification of their completion using the **Review Form When Completed** and **Receive Notification When Completed** options.

Attachments

If authorised, supporting documentation can be attached to the form using this option. Choose **Create New** to attach a new file - existing files are displayed initially. Use the **Browse** button to select an existing file.

Having chosen to send the questionnaire to WHWB you are asked whether you would like to set the form as complete:

- Choose Yes – If you would like to submit the form to WHWB (once the form has been submitted no further amendments can be made)

When your form has been submitted to WHWB you will be returned to your home screen where you will see that your referral is “Ready for Promotion”, this means that it is with WHWB and ready for action.

- Choose No –If you are not ready to submit the referral simply click ‘no’ and then return to the questionnaire at a later date (See section below titled AMENDING PORTAL FORMS)

11. The Home Screen

Options

Workplace Health & Wellbeing

Current View

My Forms

Date Created

From: 31/10/2016 To: 31/10/2017

Completed Date

From: 31/10/2016 To: 31/10/2017

Options

Refresh Results

Create New Online Form

My Forms - 1 record found

Form Type	Status	Comments	Date Completed	Date Created	Appointment Da...	Appointment Ti...
Management Referral	Ready for Promo...		Tue 31/10/2017	Tue 31/10/2017 1...		

Submitted forms display on your home screen as 'Ready for promotion' until reviewed by a member of the WHWB Team. Once it has been processed the completed form will be given a status of 'Promoted'.

12. What happens next

- WHWB will triage the referral and aim to arrange an appointment with the individual within 24 hours
- If the individual DNA's or Late Cancels their appointment you will be informed
- To comply with the Access to Medical Reports Act 1988 - The employee can request to see the report before it is released to the referring manager. WHWB will inform you when the request has been made and of any possible delays in sending the report to you.
- To comply with the Access to Medical Reports Act 1988 - Even though the employee has agreed to the referral they have the right to refuse the release of the report. If this situation does occur you will be advised within 5 working days from the appointment or as soon as possible and you should seek advice from the HR team.

Completing Incomplete Forms

1. Double-click on the form record displayed in the middle of the screen or select it and click on 'Open Online Form' in Options on Left hand side of screen

The screenshot shows a web application interface for Workplace Health & Wellbeing. On the left is a sidebar with the 'Options' menu. The main area displays a table of forms under the heading 'My Forms - 1 record found'.

Form Type	Status	Comments	Date Completed	Date Created	Appointment Da...	Appointment Ti...
Management Referral	Ready for Promo...		Tue 31/10/2017	Tue 31/10/2017 1...		

The sidebar 'Options' menu includes:

- Current View: My Forms (selected)
- Date Created: From: 31/10/2016, To: 31/10/2017
- Completed Date: From: 31/10/2016, To: 31/10/2017
- Options: Refresh Results, Create New Online Form

Note: You may need to change the 'current view' option to "my forms" to display the form on screen

2. Work your way through the form, using the Previous Page / Next Page buttons to navigate the pages and relevant entries until you have complete the process detailed in pages 1 to 6 of this document.

Reviewing Completed Forms

1. Double-click on the form record displayed in the middle of the screen or select it and click on 'Open Online Form' under Options on Left hand side of screen.

The screenshot shows the 'Options' sidebar on the left and a table of 'My Forms' on the right. The sidebar includes filters for 'Current View' (My Forms), 'Date Created' (From: 31/10/2016, To: 31/10/2017), and 'Completed Date' (From: 31/10/2016, To: 31/10/2017). The 'Options' menu at the bottom includes 'Refresh Results' and 'Create New Online Form'. The table on the right has columns: Form Type, Status, Comments, Date Completed, Date Created, Appointment Da..., and Appointment Ti... It contains one record: Management Referral, Ready for Promo..., Tue 31/10/2017, Tue 31/10/2017 1...

2. Select the 'Review Form' option

The screenshot shows the 'Review Form' screen for a 'Management Referral'. The left sidebar has a red circle around the 'Review Form' option. The main content area displays the form details: Form Reference (QD373947), Form Type (Management Referral), Details (a large grey box), and Status (Ready for Promotion). A 'Continue' button is at the bottom right.

The Form details screen will be displayed.

3. Use the Previous page / Next Page buttons to navigate through the pages of the form to review the entries

Note: Answers given to previously completed forms are displayed in a grey box

Please note: previously given answers cannot be edited.