A Guide to Making an Online Referral to Occupational Health

Before completing the referral, please ensure you have sought consent from the employee to be referred to occupational health and to be contacted to arrange a consultation. As per instructions from HR, you will need to enter the employee’s date of birth, so please request this before completing the referral.

1. Go to the following address
   https://orchidlive.com/orchid/dashboard/default/login

2. This is the Dashboard Log in page. Log in using the details emailed to you. The account number for Queen Mary University of London (staff) is 424.

3. This takes you to your OHWorks Dashboard where you can make your referral to Occupational Health.
4. After selecting ‘Refer an employee’, search for the name of the person you are referring. If you cannot find their name, you will need to manually input their basic details (name, address, job title, directorate, contact details, etc).

5. There is a simple referral questionnaire with sections that should be self-explanatory. Please make sure you use the dropdown box next to ‘Contract’ and select ‘Queen Mary University of London Staff’.
OHWorks Dashboard

REFER AN EMPLOYEE

Please fill in as much detail as you can. Required fields are marked with an asterisk (*).

Basics
Title
First Name *
Surname *
Known as
Contract None

Details
Date of Birth *
Address
Postcode
Country

6. Please make sure you use the dropdown box next to ‘Manager’ and select your name.
7. There is also a facility to allow you to attach any documents you think our advisor might need to see (a sickness absence record, for example).

8. When you are finished click ‘Send referral’.

9. OHWorks will receive an email alert that a referral has been submitted.

10. You will receive an email confirming your referral has been submitted and it has been received.

11. Before your referral is actioned by Occupational Health, it will be checked by Human Resources. HR will receive a notification email that a referral has been submitted and for which employee. A member of the HR team with go to the ‘Case Statuses’ section of the Dashboard and find your referral. They will then click on the icon on the far right.

12. This will open the online referral document and HR can check they are happy with the content.
13. If HR wants to make any changes to the referral, they should email qmulstaff@ohworks.co.uk advising what changes are needed and OHWorks will update the referral. If they are happy with the referral and want to us to proceed, they should email us at the same address to confirm this.

14. The manager and HR can track the progress of the referral 24 hours a day by checking the ‘Case Statuses’ section from your Dashboard.
15. At all stages we will give the referral a ‘Case status’. The default status when the referral is submitted and received but no action has been taken is ‘To process’. Subsequent statuses could include:

- Requires F2F appointment with OHA
- Requires telephone consultation with OHA
- Requires F2F appointment with OH Physician
- Cannot contact employee
- Appointment booked
- Attended appointment
- Did not attend appointment
- Employee cancelled appointment
- Awaiting consent from employee to send report
- Report sent to HR/manager
- Review appointment needed
- Review appointment booked
- Case closed

16. When the report is ready you will be sent an email alert informing you the report is ready online. The report will be saved in the ‘Documents’ section from your Dashboard. From here you can also download the document or read it online.

17. The report will be shared with the employee through Orchid, they will receive an email with a link to the report and for security reasons a 16-digit code via text message in order to download their report.

18. If no review appointment has been recommended, then once we see that you have accessed and read the report, we will confirm with you that the case can be moved to the ‘Closed’ cases folder in the ‘Case Statuses’ section of the Dashboard. The report will remain in the ‘Documents’ section and you can use this as your online archive of reports about employees you have referred to Occupational Health.