

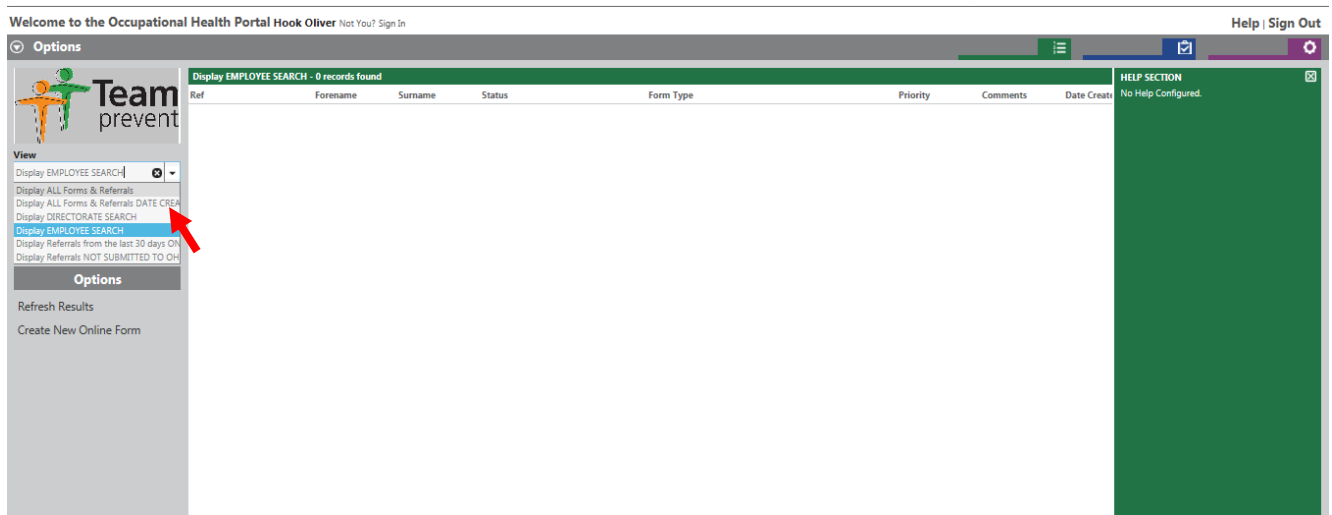
# Team Prevent Online Referral Portal

## PORTAL QUICK USER GUIDE

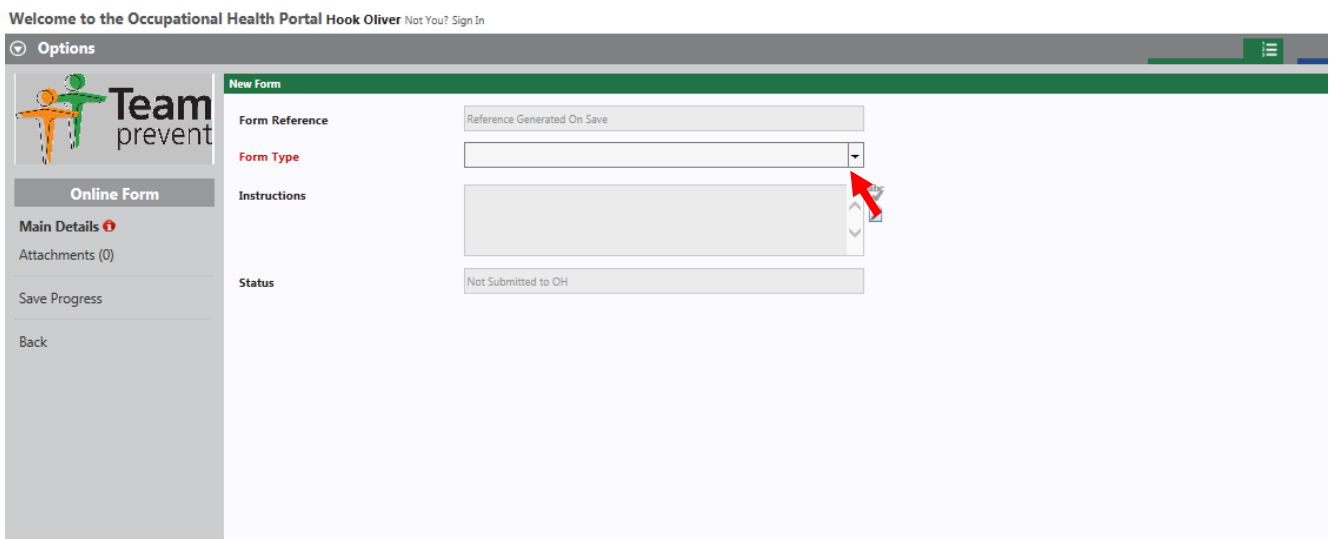
Once you have logged in to your portal you should be able to start making referrals straight away by clicking on **CREATE NEW** and following the online instructions on the right hand side of your screen. Various options are available on the left hand side of the menu. The step by step guide below has been designed to help you make your first referral.

### Making a Referral

1. From the Online Forms Page (GREEN section) you can access existing referrals and make new referrals.
2. Select a **view** from the left hand menu and then select **Create New Online Form** in the left hand column.



3. Next Choose the type of referral form that you want to complete from the drop down menu next to **Form Type**



4. Once you have selected the type of referral form that you want to complete click on the **Fill Out the Form/Referral** option in the left hand column.

Welcome to the Occupational Health Portal Hook Oliver Not You? Sign In

Options

**SHORT Management Referral Form - BCHC**

Form Reference: Reference Generated On Save

Form Type: SHORT Management Referral Form -

Instructions: Please use this form if you are aware that Team Prevent already have contact details for the employee. Full employee contact details are not required if you use this version of the form but there is a section that will enable you to provide updates or changes.

Status: Not Submitted to OH

Online Form

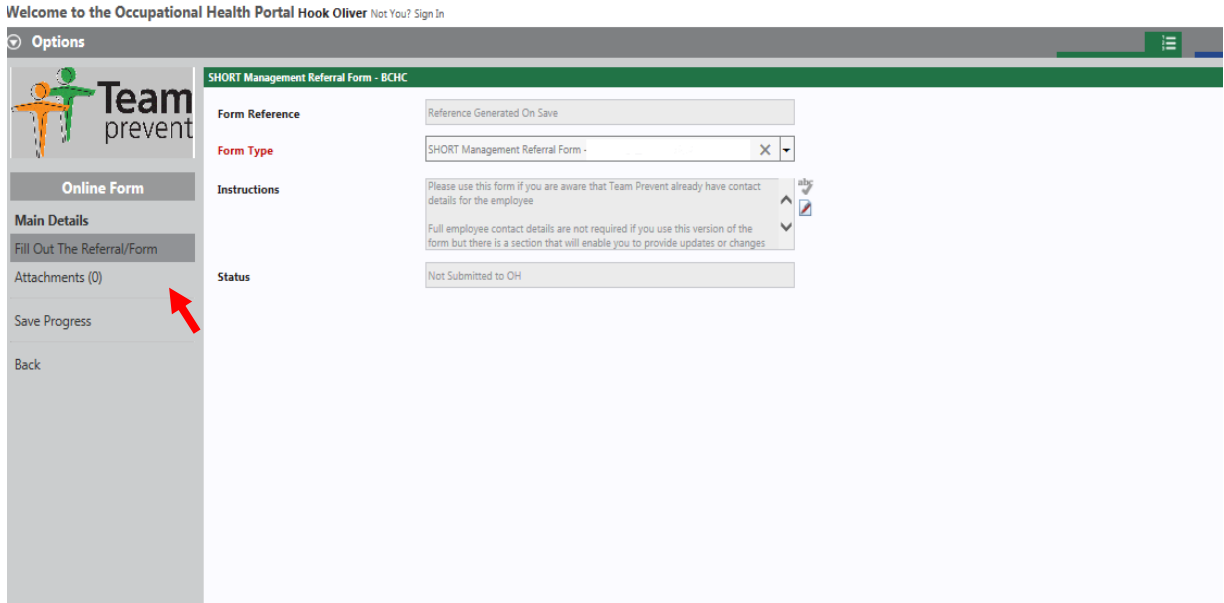
Main Details

Fill Out The Referral/Form

Attachments (0)

Save Progress

Back



5. Start to complete all the questions, to progress through the questionnaire click **Next page**.

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Options

**SHORT Management Referral Form - BCHC**

Referring Manager Information Group Score 0 Form Progress

1. Manager's Contact Telephone Number (Please provide this as we may need to contact you about your referral)

2. Manager's Contact Email Address

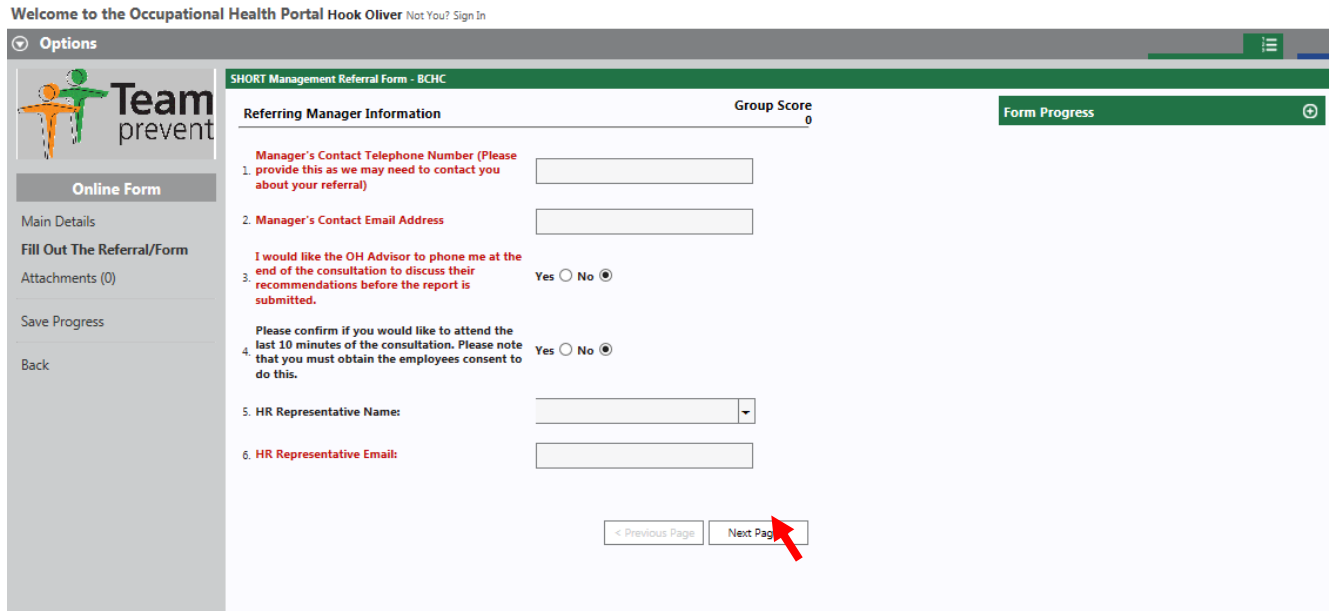
3. I would like the OH Advisor to phone me at the end of the consultation to discuss their recommendations before the report is submitted. Yes  No

4. Please confirm if you would like to attend the last 10 minutes of the consultation. Please note that you must obtain the employees consent to do this. Yes  No

5. HR Representative Name:

6. HR Representative Email:

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6. Questions marked in **red** are mandatory and must be answered

- At any time you can click on **Attachments** and then **Attach New** to add any relevant documents e.g. Absence Records.

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Options



**Online Form**

Main Details

Fill Out The Referral/Form

**Attachments (0)**

Attach New

Save Progress


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Back

| Attachment Name | Format | Size(KB) | Date Created | Comments |
|-----------------|--------|----------|--------------|----------|
| (Empty table)   |        |          |              |          |

Welcome to the Occupational Health Portal Hook Oliver Not You? Sign In

Options



**Attachment**

Attach

Back

**Attach New File**

Name

Comments

Attachment Path

- Once you have finished the Referral form you can submit the form to Team Prevent by selecting **Submit Form to Occupational Health** from the left hand menu

Welcome to the Occupational Health Portal Hook Oliver Not You? Sign In

Options

Team prevent

Attachments

Referring Manager Information Group Score 0 Form Progress

1. Manager's Contact Telephone Number (Please provide this as we may need to contact you about your referral)
2. Manager's Contact Email Address
3. I would like the OH Advisor to phone me at the end of the consultation to discuss their recommendations before the report is submitted. Yes  No
4. Please confirm if you would like to attend the last 10 minutes of the consultation. Please note that you must obtain the employees consent to do this. Yes  No
5. HR Representative Name:
6. HR Representative Email:

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Online Form

Main Details

Fill Out The Referral/Form

Attachments (1)

Reports

Save Progress

Submit Form/Referral to Team Prevent

Print

Back

- Once the form has been submitted to you can **Print** the form by selecting the appropriate option from the left hand menu. Before you submit your form you can choose to save your progress by selecting **Save Progress** from the left hand menu.

Welcome to the Occupational Health Portal Hook Oliver Not You? Sign In

Options

Team prevent

Attachments

Referring Manager Information Group Score 0 Form Progress

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Online Form

Main Details

Fill Out The Referral/Form

Attachments (1)

Reports

Save Progress

Submit Form/Referral to Team Prevent

Print

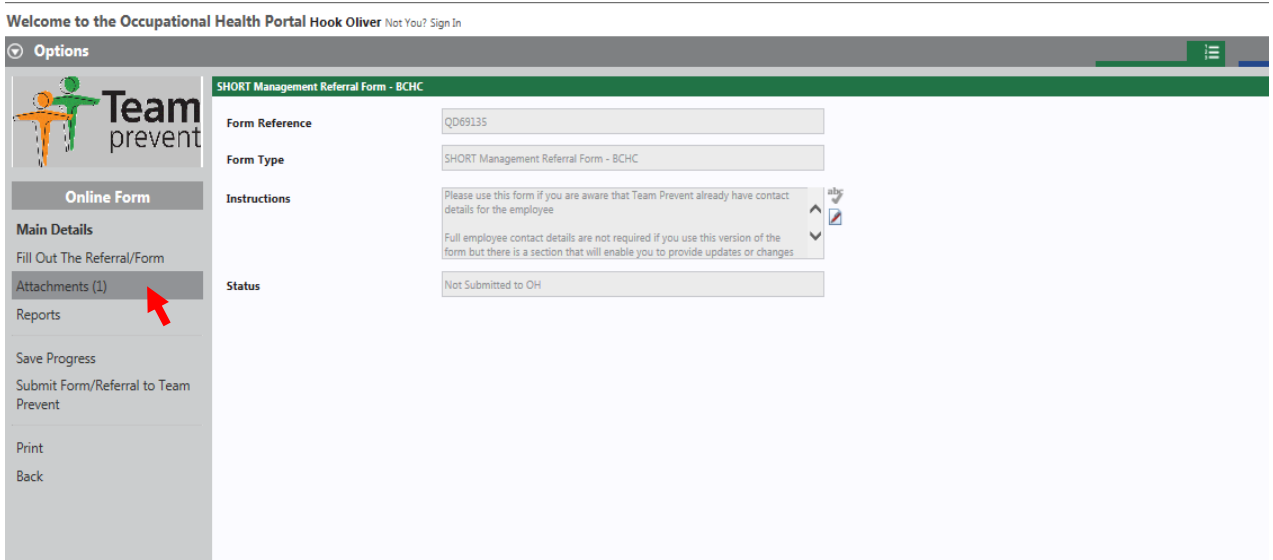
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## Appointments and accessing your Report following the consultation

10. Once your form has been submitted to Team Prevent details of appointments offered to employees and changes to appointments will be emailed to you directly
11. Once the report is ready you will be sent an email asking you to log back on to the portal to access the report. Reports are linked as attachments to existing referrals. Go to the original referral in the grid and double click on this to view the form that you completed. Click on **Attachments** and you will be able to download the report from here.

Welcome to the Occupational Health Portal Hook Oliver Not You? Sign In

Options



**Team prevent**

**Online Form**

**Main Details**

- Fill Out The Referral/Form
- Attachments (1)**
- Reports
- Save Progress
- Submit Form/Referral to Team Prevent
- Print
- Back

**SHORT Management Referral Form - BCHC**

|                |   |
|----------------|---|
| Form Reference | QD69135   |
| Form Type      | SHORT Management Referral Form - BCHC   |
| Instructions   | Please use this form if you are aware that Team Prevent already have contact details for the employee<br>Full employee contact details are not required if you use this version of the form but there is a section that will enable you to provide updates or changes |
| Status         | Not Submitted to OH   |