

Why would a Management Referral be needed?

A manager may wish to refer a colleague to PAM due to:

- Long Term Sickness Absence (LTSA)
- Short Term Sickness Absence (STSA)
- A review of an employee unable to carry out their duties fully due to health reasons
- A review as part of a continued assessment plan

What is the aim of a Management Referral?

- To provide advice on the likely duration of a sickness absence
- How a colleague's health may affect their ability to work
- Suggest rehabilitation approaches to return to the workplace if appropriate

How to create a Management Referral

Before you start the referral, you will need the following information about the employee:

- ESR staff number
- Home Address
- Date of Birth

1. To start a referral, log on to the OHIO system at <https://ohiosystems.co.uk>

Welcome to PAM OHIO your gateway to occupational health information online



Username: Password:

Keep me logged in [Forgot Login Details](#)

2. To create a new referral, click on "New Management Referral"



3. Add the name of the employee in the field (as show below) and click “Search”

When the name of the employee comes up in the list below, please click “Select” from the Action Column, and this will allow you to input the details of the referral.

Home Client Area PAM Service Reports Help

You are here: [Home](#) > [Client Area](#) > [PHIL Referrals](#) > [Add New PHIL Referral](#)

Step 1. Select the Employee > Step 2. Fill out the referral form > Step 3. Referral Created

Please search for the employee you wish to create the referral for using the search panel below.

Employee Name: DoB: Client Name:

ERN	Name	DoB	Client	Town	County	Telephone	Mobile	Action
1077504	Adam Ethyl	26/02/1966	Asda Aintree (4643)	Aylesbury	Kirkby	1515481249		View Select
63699	Addison Vergie	14/05/1991	Asda Aintree (4643)	Oldham	Liverpool	01514744020		View Select
63346	Agar Alan	22/07/1967	Asda Aintree (4643)	NORWICH	Aintree Lpool	7533284273		View Select
1019724	Agee Kay	13/11/1990	Asda Aintree (4643)	Newcastle Upon Tyne	Liverpool	01514743335		View Select
63350	Aikman Augustus	19/02/1961	Asda Aintree (4643)	Rugby	Bootle Merseyside			View Select
1047146	Akers Ferne	19/03/1960	Asda Aintree (4643)	Ware	Liverpool	01512820867		View
63445	Alevedo Kaley	21/02/1946	Asda Aintree (4643)	Romford	Liverpool	01514741481		View Select
252004	Allder Cedric	16/07/1995	Asda Aintree (4643)	Islington	Liverpool Merseyside	7744179140		View Select

4. Once you click “Select” the screen below should come up:

- Please enter all of the employee’s personal and contact details (all fields marked with a ****red asterisk**** are mandatory).
- In the Employment Details section, please enter your details as the manager and select from the dropdown box that appears.
- Finally select your name from the “Employee Managers” list and use the arrow to move into the box on the right-hand side.
- Once you finish, click “Save.”

General Details

Record Status: Reason: Changed by: Pamela Ewing on 05/01/2017 09:12

Personal Details:
 ERN: 27678
 Person ID:
 Title:
 Gender:
 Forename:
 Surname:
 DoB:

Contact Details:
 Address 1:
 Address 2:
 Town:
 Postcode:
 County:
 Telephone:
 Mobile:
 Email:
 Reminder method: Email SMS

Employment Details:
 Client:
 Department:
 Job Title:
 Last Flu Vaccination Date:

Does the employee have access to OHIO?

Employee Managers:

Please enter your details here and select from the dropdown box.

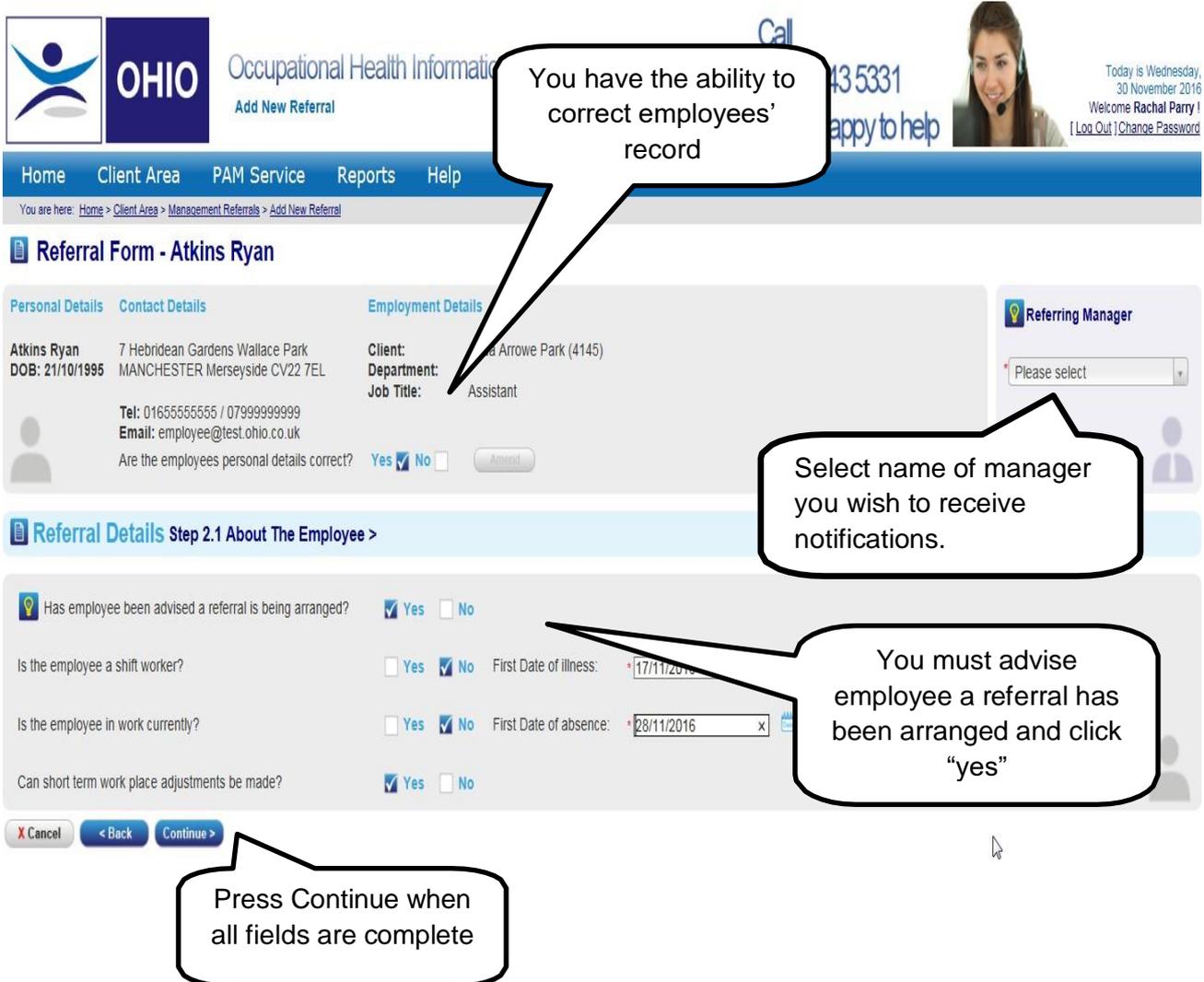
Move your name into the

5. Once you hit save, the following screen will appear:

On this page, you can:

- Confirm whether the colleagues' details are correct and make amendments if necessary
- Confirm the manager who is making the referral
- Indicate that the colleague has been advised about the referral

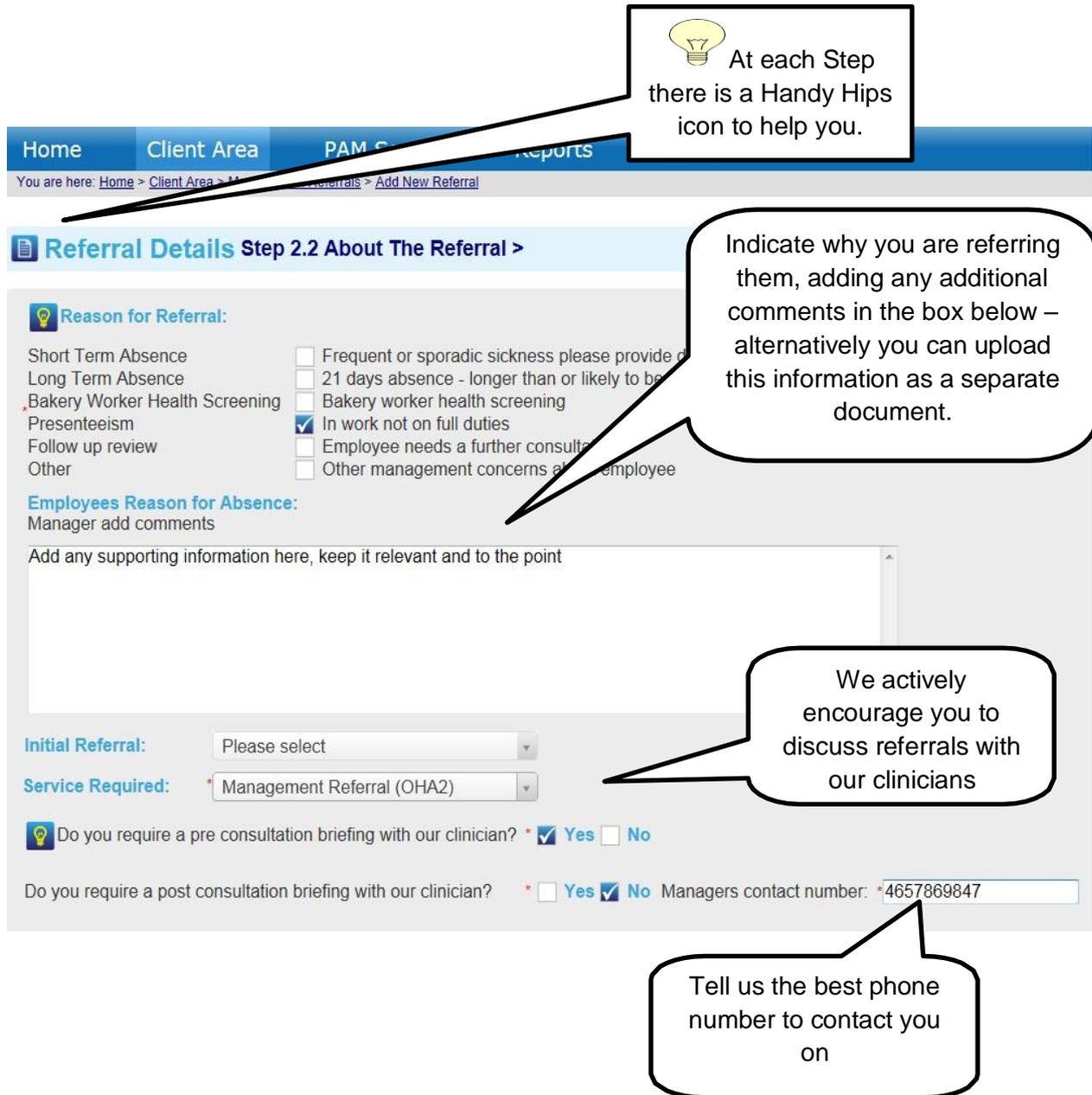
Once all sections are completed, click "Continue."



The screenshot shows the 'Referral Form - Atkins Ryan' page. It includes a navigation menu (Home, Client Area, PAM Service, Reports, Help) and a breadcrumb trail: Home > Client Area > Management Referrals > Add New Referral. The form is divided into sections: Personal Details, Contact Details, Employment Details, and Referring Manager. The Personal Details section includes fields for Name (Atkins Ryan), DOB (21/10/1995), Address (7 Hebridean Gardens Wallace Park, MANCHESTER Merseyside CV22 7EL), Tel (01655555555 / 07999999999), and Email (employee@test.ohio.co.uk). There is a checkbox for 'Are the employees personal details correct?' with 'Yes' checked and 'No' unchecked, and an 'Amend' button. The Employment Details section includes Client (Arrows Park (4145)), Department, and Job Title (Assistant). The Referring Manager section has a dropdown menu with 'Please select' and a search icon. Below these sections is the 'Referral Details Step 2.1 About The Employee >' section, which contains several questions with checkboxes: 'Has employee been advised a referral is being arranged?' (Yes checked, No unchecked), 'Is the employee a shift worker?' (Yes unchecked, No checked), 'Is the employee in work currently?' (Yes unchecked, No checked), and 'Can short term work place adjustments be made?' (Yes checked, No unchecked). There are also date fields for 'First Date of illness' (17/11/2016) and 'First Date of absence' (28/11/2016). At the bottom, there are buttons for 'Cancel', '< Back', and 'Continue >'. Callout boxes provide instructions: 'You have the ability to correct employees' record' points to the 'Amend' button; 'Select name of manager you wish to receive notifications.' points to the 'Referring Manager' dropdown; 'You must advise employee a referral has been arranged and click "yes"' points to the 'Yes' checkbox for the first question; and 'Press Continue when all fields are complete' points to the 'Continue >' button.

6. Once you click “Continue”, the following page will come up:

Fill out all relevant details, and click “Continue” at the bottom of the page.



Home **Client Area** **PAM** **Reports**

You are here: [Home](#) > [Client Area](#) > [Management Referrals](#) > [Add New Referral](#)

Referral Details Step 2.2 About The Referral >

Reason for Referral:

- Short Term Absence
- Long Term Absence
- Bakery Worker Health Screening
- Presenteeism
- Follow up review
- Other
- Frequent or sporadic sickness please provide details
- 21 days absence - longer than or likely to be
- Bakery worker health screening
- In work not on full duties
- Employee needs a further consultation
- Other management concerns at employee

Employees Reason for Absence:
Manager add comments

Add any supporting information here, keep it relevant and to the point

Initial Referral: Please select

Service Required: * Management Referral (OHA2)

Do you require a pre consultation briefing with our clinician? * Yes No

Do you require a post consultation briefing with our clinician? * Yes No Managers contact number: *4657869847

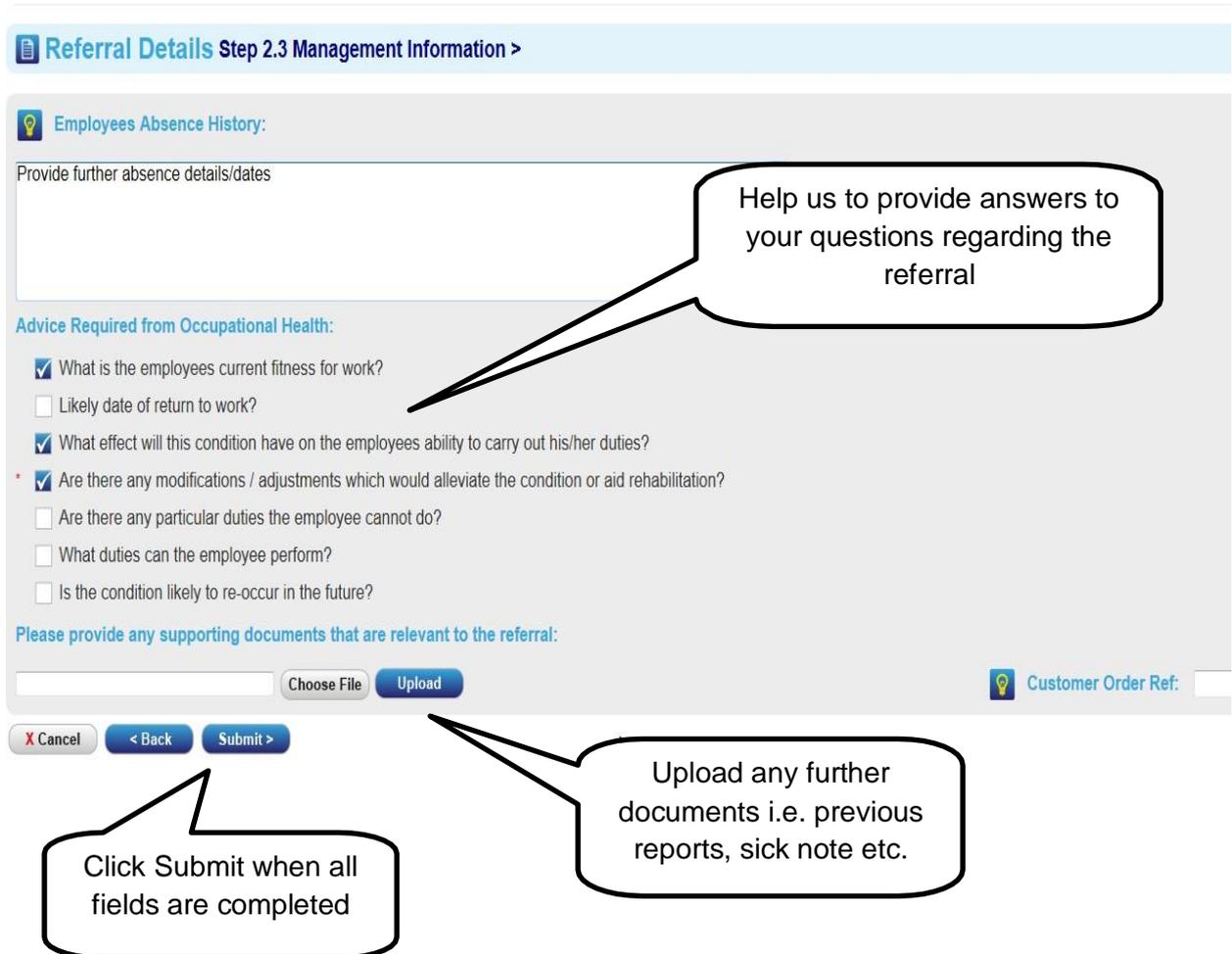
At each Step there is a Handy Hips icon to help you.

Indicate why you are referring them, adding any additional comments in the box below – alternatively you can upload this information as a separate document.

We actively encourage you to discuss referrals with our clinicians

Tell us the best phone number to contact you on

- Once you click “Continue”, the following page will come up:
Fill out all relevant details and click “Submit.”



Referral Details Step 2.3 Management Information >

Employees Absence History:
Provide further absence details/dates

Advice Required from Occupational Health:

- What is the employees current fitness for work?
- Likely date of return to work?
- What effect will this condition have on the employees ability to carry out his/her duties?
- * Are there any modifications / adjustments which would alleviate the condition or aid rehabilitation?
- Are there any particular duties the employee cannot do?
- What duties can the employee perform?
- Is the condition likely to re-occur in the future?

Please provide any supporting documents that are relevant to the referral:

Choose File Upload

Customer Order Ref:

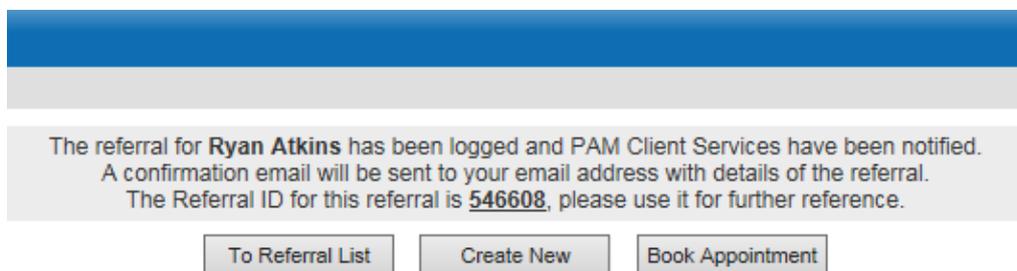
X Cancel < Back Submit >

Help us to provide answers to your questions regarding the referral

Upload any further documents i.e. previous reports, sick note etc.

Click Submit when all fields are completed

- Once you click “Submit,” a confirmation of the referral will pop up on the screen as below:



- Following this, you will receive a confirmation e-mail to confirm that your referral is complete. Please follow any instructions that you receive from PAM in relation to the referral.