

Tracking a Referral & Obtaining a Report

A step by step guide to tracking the progress of a referral and obtaining an outcome summary report

1. Log in to www.myohportal.co.uk with your current **Username, Password** and 2 digits from your 6 digit **PIN** number
2. Select **Records**
3. Select the **Service Line** of the referral you would like to track i.e. Performance & Attendance Management Referrals
 - N.B. If you do not know the referral ID or Service Line you can search for the employee via **Referral Interventions** under the Records Tab
4. Type the **Referral ID** (if known) into the search facility available and press **Enter**
5. The referral will be displayed
6. Select the **Referral ID** highlighted in blue -This will take you to the **Referral Summary Screen**
7. Along the top of this screen is a timeline providing a high level overview of the status of the referral
8. Specific information about scheduled appointments and referral interventions is also available
9. For a more detailed understanding of each step in the referral process, select **File Notes**
10. Every action related to this particular referral will be found here



Performance & Attendance Management Referrals
Comprehensive list of all referrals logged for Performance & Attendance Management

Performance & Attendance Management Referrals

Showing search results for 3474

ID	Employee Name	Customer	Logged By	Logged On	Referral St
3474	Mrs Dorris Day	UAT OH Assist Main	OHAssistUser1	10 Apr 2017	●

Records / Performance & Attendance Management Referrals

Mrs Dorris Day - 3474 Follow

Draft Pending Approval Pending Consent **In progress**

Employee Details

Name Mrs Dorris Day	Customer Name UAT OH Assist Main
Gender Female	Job Title Administrator
Date of birth 16 May 1954	Customer Identifier 8971
Email N/A	Secondary Telephone No N/A
Primary Telephone 07777385456	

Referral Details

Referral ID 3474	Referral Reason At work with health issue
Logged By Mr OHAssist User1	Employee Budget Code Not Available
Service Name OH Advice Main	Employee Business Unit HR
Logged Date 10/04/2017 14:02	
Background and History No	

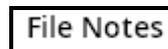
Records / Performance & Attendance Management Referrals

Mr testing testing - 3223 View Update Referral

Draft Pending Approval Pending Consent **In progress** Closed - all interventions complete

Appointment(s)

Name	Created Date	Appointment Start Date	Appointment Completion Date	Practitioner	Status	Intervention Outcome	Report Document
OH Advice MH Tel Main	5 Apr 2017 15:19				Closed - all tasks completed	Completed	
Appointment 1	5 Apr 2017 15:24	8 Apr 2017 15:22	8 Apr 2017 15:22	Occupational Therapist	N/A		



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11. Each file note gives a live detailed description of every action that has taken place for that referral, including time and date of the action
12. The referring manager will receive an email or SMS notification following the completion of every intervention in the referral process (if enabled and preferences stated)
13. When a report becomes available, an email notification will ask the referring manager to log in to the system to view the report
14. The report will be accessible in the referral record under **Documents** but can also be accessed from **Referral Interventions** (report highlighted in blue)

File Notes					
Note Type	Title	Description	Created By	Created Date	
System	Booking Task Assigned	Booking Task is assigned to (Group:1458)	System	10/04/2017 14:03	



Summary
News
Related Actions
Tasks
Managers
File Notes
Referral Interventions
Documents

Document(s)			
Document	Title	Document Type	Date on Document
VISA 07	Risk assessment	Risk assessment	04/04/2017
DSE Assessment Report (Case ID : 3154)	DSE Assessment Report (Case ID : 3154)	OH reports (to customer)	06/04/2017

Appointment(s)							
Name	Created Date	Appointment Start Date	Appointment Completion Date	Practitioner	Status	Intervention Outcome	Report Document
DSE FTF 90	4 Apr 2017 13:58				Closed - Report published with consent	Completed	DSE Assessment Report Case ID: 3154
Appointment 1	4 Apr 2017 13:58	5 Apr 2017 13:58	5 Apr 2017 13:58	Practitioner User	nA	-	-