## Tracking a Referral & Obtaining a OHAS 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

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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)

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