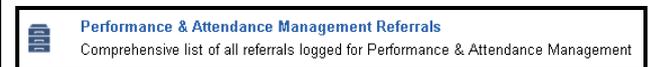
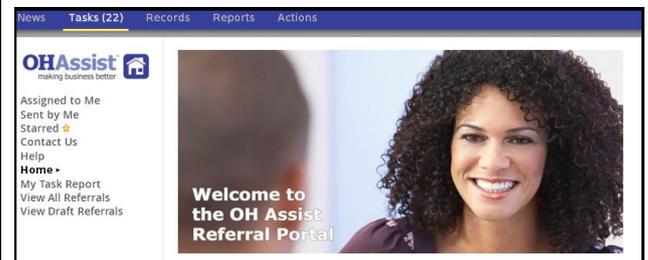


Uploading a Document to an Open Referral

A step by step guide to uploading a document to an open Referral

If you know the referral ID and the service line the employee was referred for:

1. Log in to www.myohportal.co.uk with your current **Username, Password** and 2 digits from your 6 digit **PIN** number
2. Go to **Records**
 - Every referral you have made or are associated with can be located in records
3. Select the **service line** you require i.e. Performance & Attendance Management Referrals
4. Using the search facility available, type in the **Referral ID** and **Enter** or select the referral from the list presented
5. The referral will be displayed
6. Select the **Referral ID** highlighted in blue
-N.B. this will take you to the **Referral Summary Screen**
7. Select **Documents** from the menu to the left of the screen
8. Select **Manage Documents** situated to the right of the screen. Select **Add** and **Add New Document**
9. Select **Choose File** and navigate to the document you wish to upload, then select **Open**
- N.B. The document you wish to upload must have been previously saved with the title that you would like to see displayed in the system
10. Select **Document Type** from the drop down Menu
10. Select **Add**, then **Yes**
12. Select **Finish**



Performance & Attendance Management Referrals

Showing search results for 17167

ID	Employee Name	Customer	Logged By
21789	Mr Enoch Thompson	Finance - NWR Training	Admin Lynn

OHAssist Mr testing testing - 3223

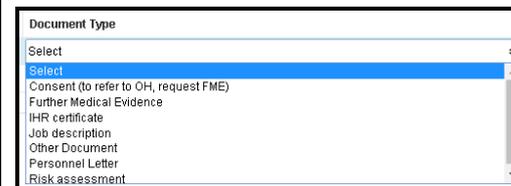
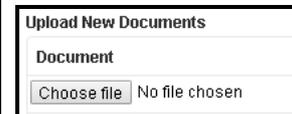
Summary - News, Related Actions, Managers & Other Contacts, Tasks, File Notes, Referral Interventions, Documents

Employee Details

Name	Mr testing testing	Customer Name	DEMO MAN
Gender	Male	Job Title #	ds03ds03
Date of Birth	29 March 1973	Customer Identifier c1	
Email	testinf12@gmail.com	Secondary N/A	Telephone No
Primary Telephone No	3212212221		

Referral Details

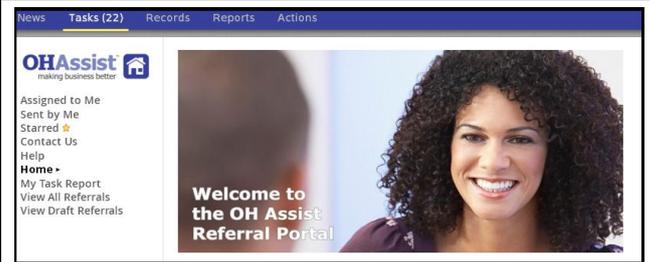
Referral ID	3223	Referral Reason	Current absence
Logged By	ms.p@health.admin	Employee Budget Code	ADC123
Service Name	OH Advice Main	Employee	Krzakow
Logged Date	05/04/2017 15:18	Business Unit	
First Day of	20032017		



Uploading a Document to an Open Referral

If the Employee name is known but the Referral ID and Referral Type is not known:

11. Log in to www.myohportal.co.uk with your current **Username, Password** and 2 digits from your 6 digit **PIN** number
12. Select **Records**
13. Select **Referral Interventions**
14. Using the search facility available, type in the **Employee Name/Referral ID** and press **Enter**, the referral details will be displayed
15. Select **Referral ID** highlighted in blue
 - this will take you to the **Referral Summary Screen**
16. From the menu to the left of the screen select **Documents**
17. Select **Manage Documents**
18. Select **Add**, then **Add New Document**
19. Select **Choose File**, Select **Document** to upload, then select **Open**
 - N.B. The document you wish to upload must have been previously saved with the title that you would like to see displayed in the system
25. Select the **Document Type** from the drop down Menu
26. Select **Add**, then **Finish**
28. Document will now be stored against the Referral



OH Assist Referral Interventions						
	ID	Referral ID	Employee	Status	Release Report Date	Created Date
All	10157	7966	Mrs Sam Smith	Closed - all tasks completed		16 Jun 2017
	9653	7580	Mr OT WISA Denied	Closed - all tasks completed		14 Jun 2017
	9656	7578	Mr Bulk Test2	Open		14 Jun 2017
	9649	7577	Mr Bulk Test1	Open		14 Jun 2017
	9795	7526	Mr WISA 01	Closed - all tasks completed		14 Jun 2017

