Creating a Management Referral

A Management Referral is made when a Manager wishes to refer an Employee to PAM due to Long Term Sickness Absence (LTSA), Short Term Sickness Absence (STSA), or Review of an employee at work but not doing the job they are employed to do because of a health reason, or a Review as part of a continuing assessment plan.

The aim is to provide advice regarding the likely duration of sickness absence; the functional effects of any ill health on the Employee's work, how their health affects their ability to work, and suggested rehabilitation approaches back into the workplace where appropriate.

How to make a new Management Referral

Once you have determined if the employee exists on OHIO you can create a new Management Referral.

If you cannot see the employee you wish to refer, please contact HR Business Support Team by emailing HR@pkc.gov.uk, who will resolve your access issue.

To create a new referral select Management Referral from the Dashboard

Add Management Referral

Search for the employee by typing their surname and press Search

Before a referral can be made, the employee must have a manager assigned to them. These employees can be identified on this page, they have no Select option in the Action column. To assign yourself as a manager click on View and this will direct you to the employees' personal details screen.

Click the "Select" link in the "Action" column of the required employee OR click View to assign a manager.

You are presented with the details of the selected employee.

Fill out the online referral form: All field marked with a **red asterisk** are mandatory.

Add Management Referral

Step 2: Fill out the Referral Form

Step 2.1: Confirm Details

Personal Details

Employee Name	Bravo Mark
Date of Birth	01/01/1970

Contact Details

Address	Holly House
City/Postcode	WA1 1SL

Employment Details

Client	Apple Site Office Employees
Department	
Job Title	Spy Manager
Telephone Number	07000000000
Email	devtest@pamgroup.co.uk

Are the employees personal details correct?

◉ Yes   ○ No   [Edit]

Select Referring Manager ❓

[Please select ▾] *

You have the ability to correct employees' record

Select name of manager you wish to receive notifications.

Step 2.2: About The Employee

Has employee been advised a referral is being arranged? ❓

○ Yes ○ No

Is the employee a shift worker?

○ Yes ○ No

Is the employee in work currently?

○ Yes ○ No

First Date of illness

[   ] 📅

First Date of absence

[   ] 📅

Can short term work place adjustments be made?

○ Yes ○ No

> You must advise employee a referral has been arranged and click "yes"

- Ensure the employees details are correct and make amendments if necessary

- Confirm who the manager is that you wish to be named on the report

- Indicate the employee has been advised about the referral

- Give details of whether the employee is a shift worker, is in work or not or whether any adjustments can be made to accommodate them

- Indicate the First date of Illness & First date of Absence.

Click "Next" when all sections are completed.

Step 2.3 About the Referral

Step 2.3: About the Referral

Reason for Referral ⓘ

○ **Short Term Absence** (Frequent or sporadic sickness please provide details below)

○ **Long Term Absence** (Likely to trigger client absence policy)

○ **Presenteeism** (In work - not on full duties due to known reasonable adjustments or workplace adaptations)

○ **Follow up review** (Employee needs a further consultation)

○ **Fit4jobs review** (Fit4jobs Referral)

○ **Blood Born Virus Incident** (Blood Born Virus Incident)

○ **Other** (Other management concerns about employee)

Employees Reason for Absence (max 3600 characters)

Comments

Initial Referral

| Please select | ∨ |

Service Required

| Please select | ∨ | *

Please ensure that the contact details for this employee are up to date.

Telephone

Mobile

07000000000

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

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

Step 2.4 About the Referral

Step 2.4: Management Information

Employees Absence History (max 1000 characters) ❓

Help us to provide answers to your questions regarding the referral

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 Files] [Upload]

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

Customer Order Ref ❓

Click Finish when all fields are completed.
The referral is now complete