## **Support Guides**



## **Creating a Wellbeing Referral**

A Wellbeing referral should be used to make counselling and physiotherapy referrals.

How to make a new Wellbeing Referral - Once you have determined if the employee exists on OHIO you can create a new Wellbeing Referral.

To create a new referral select Wellbeing Referral from the Dashboard

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<ul><li></li></ul>	Referring Manag	ger Dashboard	
: <b>8</b> 1		/	
<b></b>	Create New Referrals	1	
~ <b>+</b>	Management Health & Safety	Wellbeing	BBV
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Ē	Absence Statistics 🕜		

Step 1: Select t	he Employee							
Oberet Name		ć	glayee Names	°	r Berdi		[	Rear Search
							Carr's first who you'	e backing for? Add over simple yes
			1					Show 20 v recents per page.
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Searc	h for the empl	loyee b	y typing their surr	name 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, as 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 where you can update the referring manager.

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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.

Press "Continue" if the displayed employee record is correct.

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

Step 2: Fill out the Referral	Form	
Step 2.1: Confirm Details		
Personal Details		
Employee Name Date of Birth	Bravo Mark 01/01/1970	
Contact Details		
Address City/Postcode	Holly House WA1 1SL	
Employment Details		
Client Department	Apple Site Office Employees	
Job Title	Spy Manager	
Telephone Number	0700000000	
Email	devtest@pamgroup.co.uk	
Are the employees personal detai	ls correct?	
• Yes O No	Edit	You have the ability to
Select Referring Manager 💡		record
Please select	*	
	$\Lambda$	
Select name of the manager you wish receive notification	to is.	

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p 2.2: Fill out the Referral Form	
e previous assessments available?	Alternatively upload
rchase Order Number 🛛 😢	any supporting information.

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