PAM Group

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
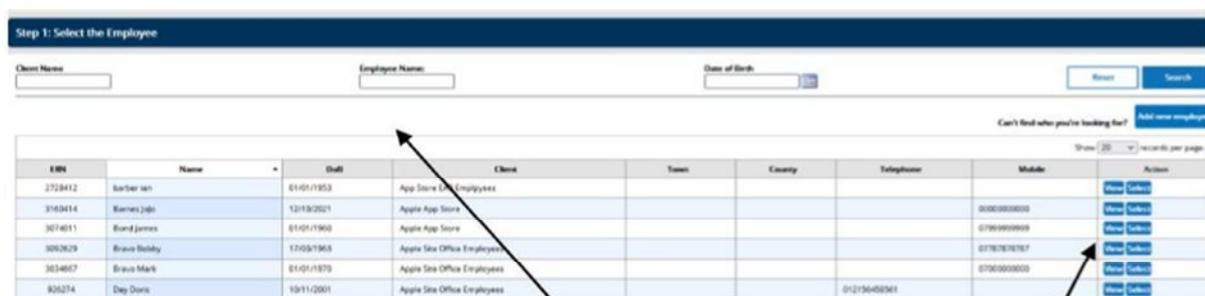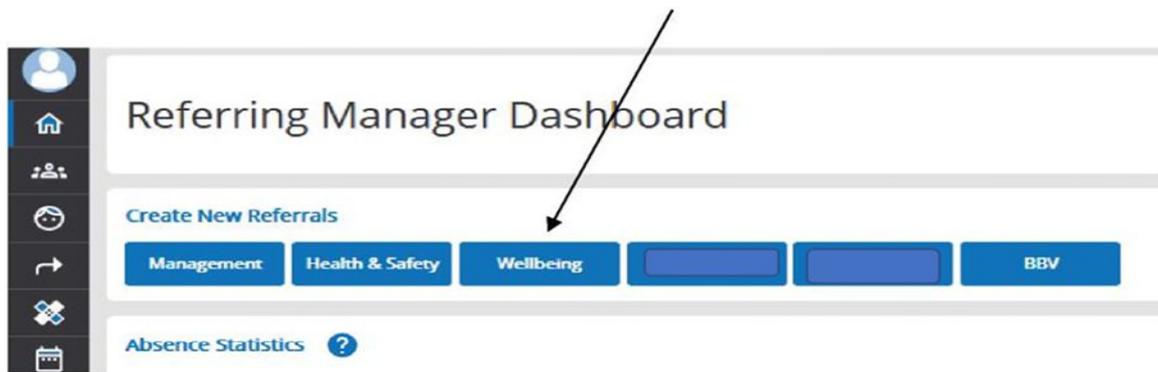
Search for the employee by typing their surname and press Search

Before a referral can be made, the employee must have a manager assigned to them. These employees can be identified on this page, 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.

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	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]

You have the ability to correct the employees' record

Select Referring Manager ❓

[Please select ▾] *

Select name of the manager you wish to receive notifications.

Step 2.2: Fill out the Referral Form

Are previous assessments available?

Purchase Order Number ❓

Supporting Documentation

Choose Files | Upload

Alternatively upload any supporting information.

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