

# Health Management Standard Reference Manual

Leicester City Council  
June 2018



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# 1. Welcome to Health Management

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This guide has been prepared to help you get the best out of your occupational health service.

Our objective is to work with Leicester City Council to:

- Support employees in the workplace as well as those who are off work
- Reduce absence rates within Leicester City and improve the health and wellbeing of employees
- Ensure best practice and legal compliance is maintained
- Provide clear and timely advice to HR and Managers

We look forward to working with you to help improve the health and productivity of your staff.

This guide contains all the information you need to ensure your occupational health programme operates effectively.

An Occupational Health (OH) Programme will consist of a number of elements each with a different purpose or aim which will include:

1. Pre-Placement Questionnaires
2. A tailored Health Surveillance programme
3. Management Referrals

The above can be grouped into three key areas :

1. Statutory Requirements
2. Business Risks
3. Management Referrals

Element	Purpose	Statutory/Non-statutory
Pre-placement questionnaires	Screening to establish baseline	Elements are statutory
Health Surveillance	Understand baseline and impact of exposure to specific risks	Statutory
Management Referrals	To assist management in managing sickness absence and Ill Health Retirement cases	Non- statutory

Please take the time to read this carefully and if you have any questions please feel free to contact Occupational Health on 0845 504 0230.

## 2. HML's Approach to Occupational Health

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Health Management is part of the Maximus Group and Leicester City Council's Occupational Health provider.

Health Management services are designed to focus on all areas of occupational health, which include risk management, legal compliance and employee wellbeing. Working closely together, Health Management will provide clinical support and guidance to your organisation to reduce absence costs caused by ill health, workplace injuries and stress.

Health Management's in-house clinical team consists of over 223 Clinical Staff including Consultant OH Physicians, GP's, OHA's and Clinical Team Managers, the largest group working together in the UK. The team is sited across our offices in the UK and they are further supported by an accredited external network of more than 250 OH Physicians nationwide, which allows employees to be seen locally, but their cases managed centrally.

The high doctor / client ratio ensures you will receive a high level of personal attention and Health Management have specialist knowledge available to your organisation across a wide range of disciplines.

Service provision is further enhanced with access to real time and easy on-line reporting, which gives instant access to meaningful and relevant management information.

### 3. Communication and Contact Details

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Our contact details are as follows:

Address for Health Management	
Health Management 2 Home Farm Courtyard Meriden Road, Berkswell, CV7 7BG	
<b>Telephone:</b> 0845 504 0230	
<b>Fax:</b> 0845 504 0231	<b>Hours of Business</b>
<b>Website:</b> <a href="http://www.healthmanltd.com">www.healthmanltd.com</a>	Monday to Friday 08.30 - 17.30 hrs
<b>National OH Clinical Advice Line:</b> 01273 007772 (for referring Managers queries, pre-referral)	

Health Management Team	
<b>Sharon Naylor</b> your Regional Clinical Manager, will be available for:	
<ul style="list-style-type: none"><li>▪ Further advice following a referral</li><li>▪ General advice on whether a referral needs to take place.</li><li>▪ Full clinical support is provided to your organisation via our team of Head Office Doctors</li></ul>	
<b>Telephone:</b> 0845 504 0230	
<b>Kim Miller</b> will be your Customer Service Manager for:	
<ul style="list-style-type: none"><li>▪ Contractual enquiries or concern</li><li>▪ Regular liaison with agreed points of contact within Leicester City Council</li><li>▪ Creation and analysis of utilisation reports on Clinical &amp; HR outcomes</li><li>▪ Proactive support for HR and the H &amp; S team</li><li>▪ Service delivery concerns</li><li>▪ Training of Managers in the occupational health service</li></ul>	
<b>Telephone:</b> 0845 872 9715	<b>Email:</b> <a href="mailto:Kim.Miller@healthmanltd.com">Kim.Miller@healthmanltd.com</a>
<b>Meriden Team 2</b> - will be your Clinical Team Administrator for:	
<ul style="list-style-type: none"><li>▪ Independent Medical Assessment – appointment arrangements, cancellations / rearrangement requests</li><li>▪ General enquiries in relation to your organisation's cases (referrals and questionnaires)</li><li>▪ When further advice is required by the CMO or Medical Advice Line.</li><li>▪ Case escalations</li></ul>	
<b>Telephone:</b> 0845 872 9715	<b>Email:</b> <a href="mailto:Meriden.team1@healthmanltd.com">Meriden.team1@healthmanltd.com</a>

## 4. How to use the Services

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This next section describes in detail how you should use the service and what you should expect from us.

- 1 Medical Advice and Telephone support
- 2 Health assessment screening at job offer
- 3 Sickness Absence Management Referrals
- 4 Ill Health Retirement Advice
- 5 Health Surveillance

## 4.1 Medical Advice and Telephone Support

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As part of the Occupational Health Service (OHS), Leicester City Council is provided with an advice line for providing advice on medical issues and policy formulation for occupational health issues such as sickness absence and drug abuse.

This service is available to access, amongst other matters, any current occupational health issues and regulatory compliance and will also provide medical advice in relation to reducing health risks to employees.

HR/Managers may also have particular employee medical issues that need to be dealt with quickly and the telephone support is provided for this purpose.

HR/Line Management should call the Advice Line to discuss:

- General occupational health issues in the business
- Specific employee health concerns
- When they are developing new policies and procedures (this may be directed to a Physician)
- Employment Tribunal advice
- General Health & Safety issues related to the health of employees

Our National OH Advice Line – **01273 007 772** will give you direct daily access to a clinician between the hours of 0900-1730.

The line is manned by Occupational Health Advisors who will deal with your queries with clear escalation routes established if advice from an Occupational Health Physician is required. A query tracker, process maps, escalation criteria and FAQs are in place.

The service does not replace your CMO but ensures one clear route to get the advice needed.

## 4.2 Health Assessment Screening (pre-employment)

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Leicester City Council has a duty of care to all its employees. The review of medical information about new entrants ensures that Leicester City Council is meeting its obligations under health and safety and disability legislation.

It is important to ensure that prospective employees are not placed in a situation where a pre-existing medical condition could be aggravated by their required work activities within their new job role. The Council must be equally vigilant in ensuring that all possible measures are taken to ensure that the health and safety of all employees is not put at risk.

Screening provides a documented record which has been evaluated by trained medical personnel of an employee's health when entering Leicester City Council. This may prove useful if any compensation claims arise as a result of ill-health in the future and also to prevent an employee being put at risk due to their state of health.

All prospective employees of Leicester City Council are required to complete a health questionnaire on receipt of a job offer. Where additional information is required for specialist roles such as **Night-workers** (as defined under the European Working Time Directive), the relevant, specific questionnaires should be selected and completed.

The questionnaire holds intelligent addendums, which will be provided to the applicant dependant on the activities selected for the role.

The standard procedure for a health assessment is outlined below.

If you are unsure about using the HAQ service, please contact us on 0845 504 0230.

### How it works

Before submitting your first on line questionnaire or referral you will need to create an account. Details of how to complete this process are in the appendix of this document.

#### Stage 1

Once logged in you are taken to the dashboard. On the dashboard there are choices for both referrals and questionnaires (please note you can always return to this screen by clicking the navigation link in grey at the top of the screen).

- Click on the **Request Questionnaire** link either from the main menu or from the blue drop down menu along the upper section of the screen.
- **Select Health Assessment Questionnaire required** (or the description of the type of questionnaire that you wish to complete i.e. **Health Assessment Questionnaire for Nightworkers**)
- You will be taken to the questionnaire form. The form is split into 4 tabs.
- Please work through the form completing **all required fields**.
- You will be required to enter the **employees email address** at the last step.
- The system will then send a link email to this address for the prospective employee to click on in order for them to finish the form
- Press **Submit form**.

Once you have submitted a Questionnaire and it has been accepted by Health Management then you can track the progress of your case. Click on the **Track questionnaire**. There are three tabs which show those questionnaires that are awaiting the employee to complete their sections, those submitted to Health Management but not yet closed and those that are closed. You can sort the table by clicking on any of the headings.



## Stage 2

Once the clinicians have assessed the questionnaire, you will be sent an e mail informing you that it is ready for downloading. To collect the outcome certificate;

- Log in on the online system
- Go to **Track questionnaire**
- Click on **Closed cases**
- Click on the named employee and **View** their documents

This will present you with an HM50 Fitness Certificate, which will state the outcome of the assessment.

## Stage 3

If the clinical team decides further investigations are necessary, we will contact you to seek authorisation to arrange for a GP/Specialist medical report and/or a pre-employment medical (Independent Medical Assessment (IMA).)

## Stage 4

Appointment details of the independent medical assessment will be forwarded to HR/Line Management contact, who will be responsible for notifying the employee of the time, date and venue for the assessment. Directions will also be included.

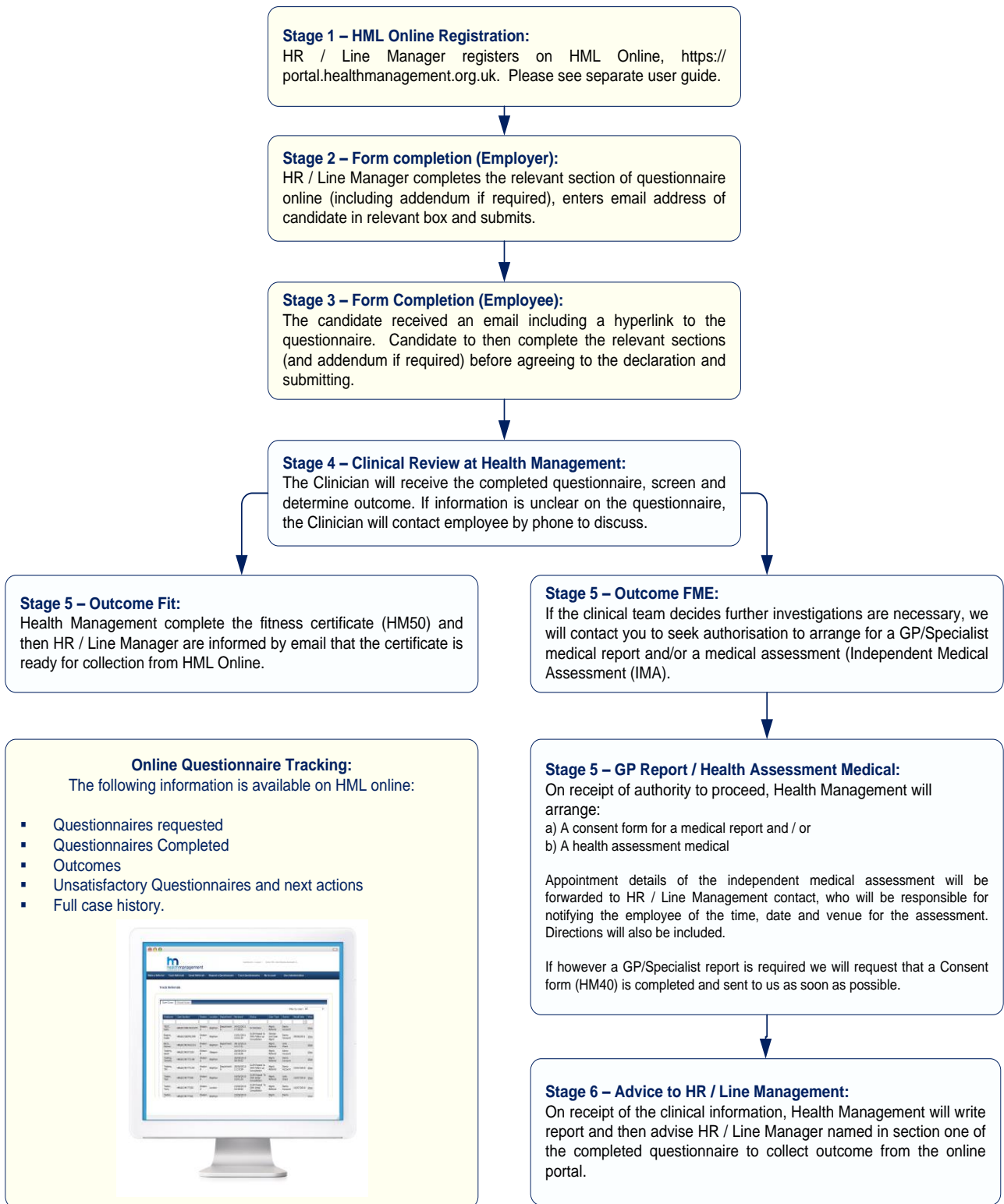
If however a GP/Specialist report is required we will request that a Consent form (HM40) is completed and sent to us as soon as possible.

## Stage 5

On receipt of the clinical findings, we will determine the outcome and send a report of explanation to the relevant HR/Line Manager as named in Section One of the completed questionnaire.

Medical confidentiality will prevent Health Management from providing you with any clinical details, although details of any recommendations together with restrictions and their time span may be given. In some cases a review after a few months will be recommended, e.g. to monitor absence record. It is important for HR/Line Management to act on recommendations, if the appointment goes ahead.

# Health Assessment Questionnaire Flowchart



## Health Assessment Addendums

For some roles we require additional information on top of that collected by the basic questionnaire. These additional information sets are known as questionnaire addendums. They might be used for example where your employee is involved in vocational driving or perhaps they work with children or vulnerable adults.

Based on your responses to your part of the questionnaire the system will automatically generate the necessary addendums for the employee to complete. Note that it is imperative which risks you tick therefore please ensure to take care when submitting the HAQ.

Please find below addendums for reference only, which may be used for the risks highlighted. These are automatically selected by the system.

### **HM301 Addendum – Working in safety critical environments, confined spaces, at heights and/or vocational driving**

Safety critical tasks will include those where if sudden incapacity developed it could put the employee, co workers or members of the general public at risk:

- Working at heights ( above a 3 step step-ladder)
- Working with unguarded or moving machinery
- Working with live electricity
- Working over open water
- Working alone
- Vocational driving (see below)
- Piloting an airplane
- Conning a ship or boat
- Air traffic, train or vehicle control
- Those working with refuse or recycling collections

This addendum also includes those working in confined spaces such as tanks, kilns, underground etc.

Vocational driving includes driving a motor cycle, car, lorry, passenger carrying vehicle, fork lift truck, train or automated manual handling equipment for work.

### **HM302 Addendum – Working with vulnerable adults and children**

Work involving adults who may be deemed vulnerable includes all inpatients or those in sheltered housing or care centres.

This addendum should be used for individuals working with any children (not only vulnerable children).

### **HM304 Addendum – Laboratory workers and those working with skin sensitizers**

Where an individual will be working in a laboratory environment where they will be in contact with chemicals, biological agents and/or animals or undertaking research which may include lab work.

Anyone working with skin sensitizers as part of their role, they should also complete this questionnaire.

Additional questions may be needed and this requirement will be driven by the risk assessment. Please speak to your CMO if necessary.

## **HM305 Addendum – Night workers**

A night-worker is defined as one who regularly works for at least 3 hours between the hours of 2300-0600.

## 4.3 Online Management Referral Process

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HR/Line Management may request that an employee be assessed by the Occupational Health Service, so that appropriate medical advice can be given to HR/Line Management and the employee.

Our clinical team will send you a report giving clear advice, which will cover:

- ✓ Fitness to work
- ✓ Restrictions or adaptations on employment
- ✓ Prognosis on returning to work
- ✓ Implications of the Disability legislation
- ✓ Appropriate attendance or capability targets
- ✓ Likelihood of further absences
- ✓ Eligibility for Permanent Health Insurance (PHI) or ill health retirement, if applicable

HML have a team of experienced clinicians and occupational health physicians. This ensures the optimum medical advice can be provided. Where a face to face assessment has been triaged, a face to face consultation can usually be carried out within 5-15 working days and a report provided shortly thereafter.

### Recommended triggers for when to use this service

1. An employee has been, or is likely to be, off sick for longer than 4 weeks or where there is no foreseeable return-to-work date.
2. An employee has frequent incidences of short-term absence with one or more reported illnesses.
3. An employee has had an accident at work and an accurate clinical record of their injuries is required, including RIDDOR incidents.
4. A manager believes that an employee's health is being affected adversely by his work (e.g. stress, upper limb disorders or back pain).
5. An employee is about to be transferred to another job or is about to be promoted and a medical assessment is required.
6. An employee's performance at work may be compromised because of ill health.
7. An employee is diagnosed with a critical illness such as psychiatric ill health, cancer or heart disease.
8. An employee is thought to be suffering from alcohol, drug or substance misuse.
9. An employee has notified you that they are concerned about their own ill health, particularly if they believe their health is being affected by work.
10. Advice is required on rehabilitation programmes for sick or disabled employees.
11. You require a report regarding an employee's fitness to attend a disciplinary or grievance hearing.

If you are unsure if a referral is required please contact the clinical advice line to discuss the case on 0845 504 0230. Advice at this stage should be sort for hypothetical and/or anonymised cases.

## How it works

Before submitting your first on line referral you will need to create an account. Details of how to complete this process are in the appendix of this document.

### Stage 1

Once logged in you will be taken to the dashboard.

To then make a referral;

- Click on the **Make a referral** tab
- Select **Standard referral**.
- You will now be presented with a series of tabs.
- The first tab will have pre-populated from your log in account details however if PO numbers are required you will need to enter this information on the first tab
- Progress through the various tabs completing the sections as required. Please note certain fields are compulsory (arrows next to them)

At step 6 you have the opportunity to attach any supporting documents such as a job description, absence history etc. You may attach the document by browsing your computer and selecting a file in the same way as you would attach a document to an email.

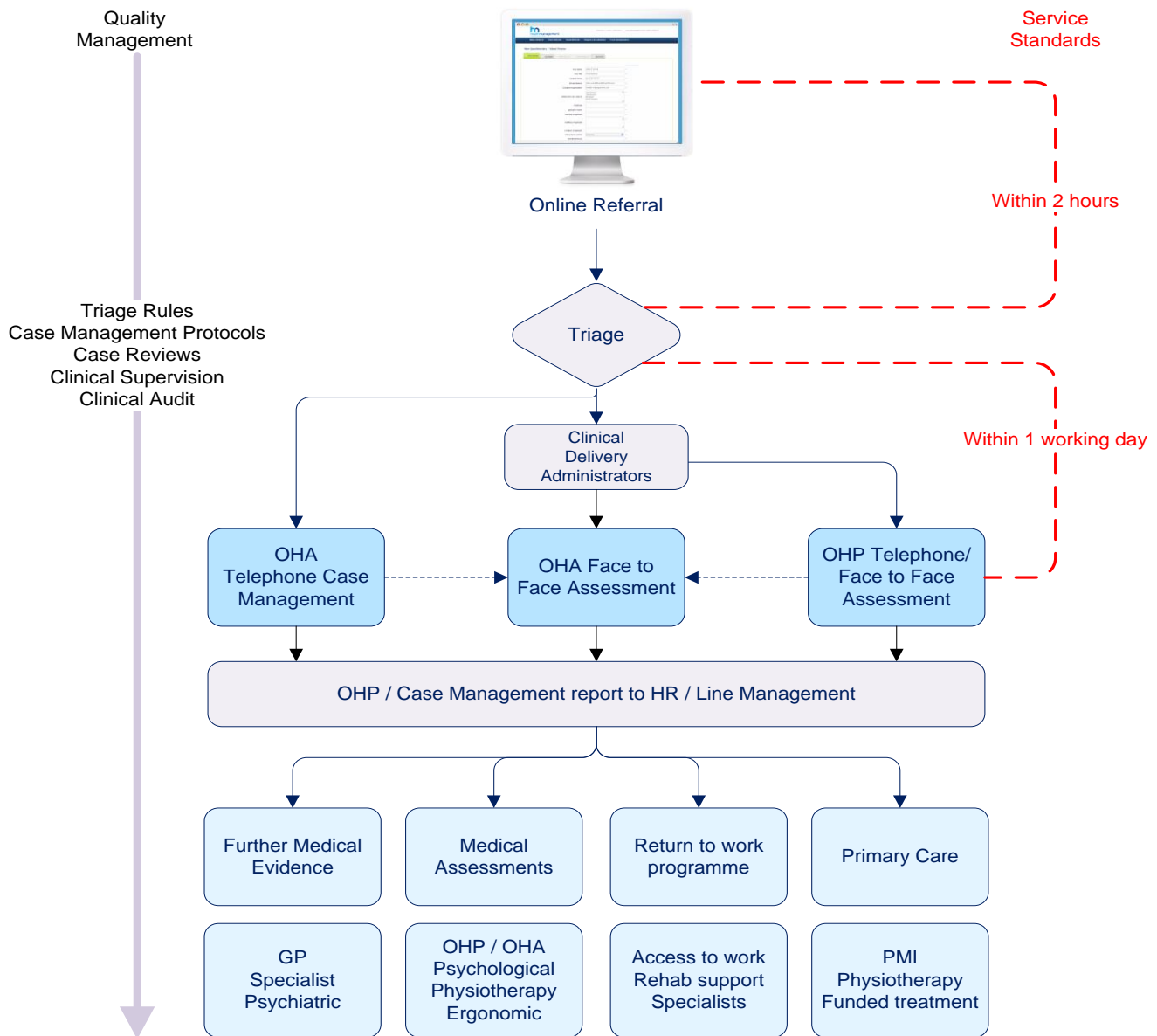
Once you have completed all the tabs click on the **Submit** button.

(At any time you can save the referral for completion later, simply press the **Save** button, and then you can go back to incomplete referrals using the **Saved referral** tab. The referral will close after 20 minutes of inactivity for security reasons so using the 'save for later' button will ensure anything already entered is in place upon your return).

### Stage 2

The referral will arrive via the portal to the HML Triage queue; the Clinician will triage the case within 2 hours and decide the next course of medical intervention that is required. Depending on the referral information provided this will either be to a nurse case manager or a face to face assessment by the onsite OHP.

# Management Referral Process Flowchart



### Stage 3

If the triage process determines that the correct next action is for telephone case management, and Leicester City is happy with this approach, the employee will be contacted and a suitable appointment agreed.

Once the Case Manager makes contact with the employee, they will explain their reason for calling and obtain verbal consent from the employee to continue with the conversation and record this on our systems. They will also obtain permission to report any relevant information back to their line manager and/or HR. If the employee refuses to give consent, we will terminate the call and inform you by e-mail

Once consent is received the Case Manager will continue with the assessment to ascertain:

- ✓ type of illness
- ✓ anticipated recovery time
- ✓ what if any, treatment the employee is awaiting
- ✓ what modified duties can the employee carry out
- ✓ can the employee continue to work now
- ✓ is further medical evidence required?

The Case Manager will provide immediate advice. Any support required will be planned and agreed to facilitate a return to work, including short term intervention and rehabilitation. The Case Manager will also discuss long term support if it is required and will confirm any underlying health issue.

After the assessment, the Case Manager will prepare a written report, which will confirm the health problem and any appropriate actions and detail the return to work plan with any suggestions or modifications which may facilitate this.

If a return to work is not imminent at this stage, the Case Manager will provide details of any treatment being awaited/received or suggest any intervention which may be necessary. If further medical information would be beneficial, we will suggest that this is obtained.

We will confirm that the case will be closed.

Once the report is complete an e-mail will be sent to you (the referrer) confirming that the report is ready for downloading/collection from the website.

- Log in using the [www.healthmanltd.com](http://www.healthmanltd.com) website and enter your password and user name in the portal.
- Once on the dashboard go to **Track Referrals**. They are then split between open and closed cases. If you have permission to view colleagues cases you can use the filter option in the top right of the tab to see their cases
- Click on **View** next to the relevant employee's name
- Go to the **Documents** tab
- The report will be available here, click on the right to download or view it, along with any additional notes or comments.

If a face to face assessment is identified then the Clinical Delivery Team will arrange a suitable appointment through the onsite clinic and notification will be sent to the manager to advise the employee.

Following the face to face medical assessment if further medical evidence is required then the consent form (HM40) gives us the legal rights to obtain one from either the employee's General Practitioner or Consultant / Specialist.

Please give the employee a copy of the "Guide to the Independent Medical Assessment" which is located at the back of this manual (an electronic version will also be attached to their IMA appointment details.) The document is designed to provide support to both HR and employees as it explains the process and answers the most frequently asked questions.



## Stage 4

If the triage process determines that the best next course of action is a face to face assessment then the Clinical Team will arrange a suitable appointment through the onsite clinic. Details of the assessment will be forwarded to the relevant referring Manager who will be responsible for notifying the employee of the time, date and venue for the assessment.

Please give the employee a copy of the “Guide to the Independent Medical Assessment” which is located at the back of this manual (an electronic version will also be attached to their IMA appointment details.) The document is designed to provide support to both HR and employees as it explains the process and answers the most frequently asked questions.

If the employee has a valid reason for not attending the appointment please contact your SDA immediately. Cancellation costs will occur if the employee does not arrive or we are only informed of the need to alter the time 48 hours, or less, of the scheduled appointment.

SMS messages will be issued to the mobile number provided, at 72 and 24 hours before the appointment.

Following the face to face medical assessment if further medical evidence is required then the consent form (HM40) gives us the legal rights to obtain one from either the employee’s General Practitioner or Consultant / Specialist.

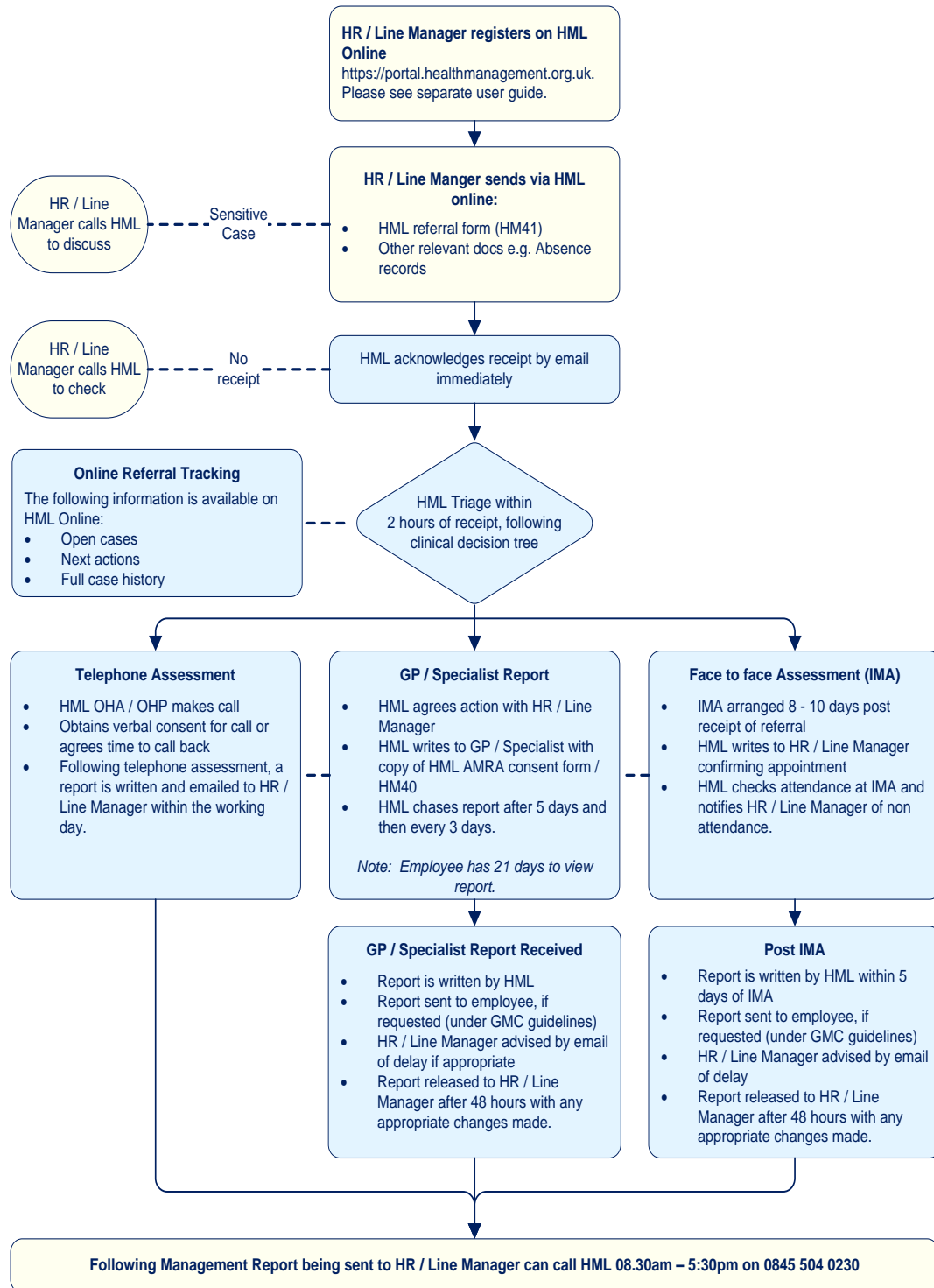
The SDA team will inform you in writing within 24 hours of the employee’s attendance and they will chase for the report every few days, informing you of the progress by email so you are completely aware at all times on the progress of the referral. If a GP / Specialist report has been requested you will also receive regular notification of the progress on the request and when we are likely to receive the report.

Once again on receipt of the clinical findings, we will send an e mail to the HR/Manager confirming that the advice letter is ready for downloading/collection from the website.

- Log in using the [www.healthmanltd.com](http://www.healthmanltd.com) website and enter your password and user name in the portal.
- Once on the dashboard go to **Track Referrals**. They are then split between open and closed cases. If you have permission to view colleagues cases you can use the filter option in the top right of the tab to see their cases
- Click on **View** next to the relevant employee’s name
- Go to the **Documents** tab
- The report will be available here, click on the right to download or view it, along with any additional notes or comments.

Should you have any queries, concerns or require further clarification on the content of the report, please contact us as soon as possible on 0845 504 0230.

## On-line Management Referral Process Flow chart



## 4.4 Ill Health Retirement Advice

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Each case will be assessed on receipt, and a suitable Physician allocated to conduct the assessment.

After the completion of the investigation, Leicester City Council will be issued with a decision letter from Physician, outlining whether:

- ✓ The employee meets the eligibility criteria
- ✓ The employee meets the medical criteria
- ✓ Further medical evidence is required
- ✓ Documentation is complete

Periodic medical assessments may be advised in cases where in the opinion of the assessing Physician, there is the possibility that some recovery would occur.

Should you have any questions or queries please contact 0845 504 0230.

### How it works

#### Stage 1

Log in to the HML portal and complete the Ill Health Retirement referral form (HM4101) providing as much background detail on the case as possible including job descriptions, absence records and other relevant information. Please also enclose a copy of your pension rules or criteria.

Please familiarise yourself with the Consent Form (HM4001), ensure you have read and fully understood the sections on Employee Rights and Consents and on Medical Ethics and Confidentiality, before discussing with the employee the reasons for the referral.

If the employee understands the rights and consents please ask them to complete and sign the form. Keep a copy of the form to upload at the end of the online referral completion. This can be uploaded on the declaration tab via the browser.

Once complete, click send and the referral and associated documents will be sent to HML triage.

#### Stage 2

On arrival in triage, our clinical team will decide whether further clinical information is required and if so the most appropriate course of action to take.

#### Stage 3

If a medical report is required, the consent form (HM4001) gives us the legal rights to obtain one from either the employee's General Practitioner or Consultant / Specialist.

If an independent medical assessment (IMA) is required, we will arrange for this to be carried out by a Physician at the clinic based in Leicester. If, for medical reasons, the employee is unable to travel to the premises of the examining doctor, alternative options will be discussed with the referrer.

#### Stage 4

Details of the assessment will be forwarded to the relevant HR Contact / Line Manager who will be responsible for notifying the employee of the time, date and venue for the assessment

We also request that you give a copy of the “Guide to your Independent Medical Assessment” to the employee as this will provide additional support from HR by answering questions the employee may have about the assessment to ensure they are fully prepared.

If the employee has a valid reason for not attending the appointment please contact your SDA team immediately. Cancellation charges may apply if the employee does not arrive or we are only informed of the need to alter the time 2 working days, or less, of the scheduled appointment.

### **Stage 5**

The SD A team will inform you in writing within 24 hours of the employee’s attendance and they will chase for the report every few days, informing you of the progress by email so you are completely aware at all times on the progress of the referral.

If a GP/Specialist report has been requested, you will also receive regular notification of the progress on the request and when we are likely to receive the report.

### **Stage 6**

On receipt of the clinical findings, we will send a report to the HR Contact/Line Manager as named on the ill health retirement referral form, addressing the specific issues and questions raised.

Should you have any queries, concerns or require further clarification on the content of the report, please contact us as soon as possible on 0845 504 0230.

## 4.5 Planned Health Surveillance

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Our objective is to ensure that Leicester City Council is cost effectively complying with relevant Health & Safety legislation.

Leicester City Council will have already completed role based risk assessments for their employees. Based on the information supplied to us by Leicester City Council, in the form of a Comparable Exposed worker Group grid, we will be able to schedule role appropriate health screening for those Leicester City employees identified.

The screening can be conducted at premises to suit the location of the employees.

The CEWG will highlight what surveillance is required; this may include:

- Drivers and fork lift truck operator's assessments
- Audiology
- HAVS and manual handling assessments
- Dermatology & Lung function assessments (COSHH)
- Asbestos screening

Please ensure that appropriate Line Managers details are provided with the screening documentation.

### How it works

#### Stage 1

Leicester City Council will need to establish the risk assessments and necessary surveillance required. Upon confirmation of the type of assessments required, a 'Comparable Exposed Worker Group' (CEWG) grid will be developed to ensure all employees receive the appropriate surveillance.

#### Stage 2

You will need to provide lists of all employees, at each location, who require health surveillance with their job roles (as defined within the CEWG) to us.

HML will then establish how many days your organisation require a technician or team of specialists, on site. This will be dependent upon the nature of the surveillance required, the locations, and number of employees to be seen.

Once the dates are confirmed, an appointment sheet for each day on site will then be sent to the nominated on-site contact(s) with the request that employees are booked into the recommended slots.

#### Stage 3

The technician will arrive approximately 30 minutes prior to the first appointment and report to the site visit contact to briefly discuss the days' assessments and agenda.

Following this, the technician will conduct each individual's health surveillance assessment on a one to one basis.

After the last appointment, the technician will ensure the site visit contact is made aware of any staff who did not attend and provide verbal feedback.

#### **Stage 4**

Within ten working days of the health surveillance visit taking place a report will be produced for your organisation detailing the outcomes on each assessment conducted.

These will comply with current legislation and individual records will be created. The records will include group anonymised data giving an overall picture of Leicester City Council (form HM21), as well as individual employee record(s) (form HM20).

Should any employees be classified as unfit, fit with restrictions or require a referral we will highlight this information and recommend appropriate action.

Certain cases may need to be referred to a Physician for a further opinion.

Records in relation to health surveillance should be stored in a safe or locked cabinet and all COSHH records must be kept for a minimum of 40 years.

## 5. HML Online Portal

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### Stage 1

Before submitting your first on line questionnaire or referral you will need to create an account. (Further details on the portal are available in the appendix).

To register for a new account you will need to visit:

<https://portal.healthmanagement.org.uk>.

Please note you will need to type this into the address bar at the top of your web browser exactly as it appears here.

- Click the **Log in** button (top left hand corner)
- Click the **Register** button.
- Please complete the registration using your own name and work email address.
- Enter the validation code.
  - **Please complete the Occupational Health e-learning course on Learning Pool to obtain the latest code**
- Click/tab the **Validate Codes** button once you have entered it.
- The screen should show '<Your Company Name>', and 2 further drop down boxes will appear next to 'Company Name' if everything has been entered correctly.
- Select your manager' and 'location' choices will appear.
  - Manager' in this context means either your HR 'superuser' or other nominated person in your organisation's hierarchy, this is not necessarily your line manager. Please refer to the OH implementation team if you are unsure.
  - The 'location' choice is from a pre-selected list, as given by your organisation.
- Your **email address** must be your work email address. (We can accept registrations only from email domains that have been previously registered with us)
- Your user name should be your first **name.surname**.
- Your password should be at least 10 characters long and must comply with the following password complexity criteria:
  - Must contain at least one Uppercase character (A through to Z)
  - Must contain at least one Lowercase character (a through to z)
  - Must contain at least one number character (0 through to 9)
  - Must contain at least one special character (! \$ # or a space character)
  - Must not contain more than two of the same characters in a row (e.g. aa is ok, aaa is not ok)
  - Must be 10 to 100 characters in length
  - Must not contain the user name
  - Must not be a common word (e.g. Password12)
- Once you have completed the form and validated your codes click the **Register Now**
- button
- You will now receive an email from [online@healthmanltd.com](mailto:online@healthmanltd.com). This contains a link which you must click to activate your account.
- Once your account is activated follow the link to **Log On**

Once you are registered you can access the secure on line pages via the corporate website to create both questionnaires and referrals. You do not need to set up a separate account for questionnaires and referrals.

To log in via the website, once you have an on line account set up, go to [www.healthmanltd.com](http://www.healthmanltd.com), on the home page there is a secure client log in box on the right, enter your **user name** and **password** then click **on line**.

### Password reset

You may request a password reset by clicking on the **Forgot Password** link at the login screen.

## 6. Health Matters Website

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As part of our ongoing commitment to help employers support and encourage the health and wellbeing of their employees, Health Management has developed the “Health Matters” employee health and wellbeing website.

It is designed to be accessed through Leicester City Council’s intranet or via the web and provides unlimited access for all employees on a wide range of health related issues and topics.

The site has five main areas of interest which in turn give access to a series of guidance and briefing notes. The information can be accessed on line or downloaded as PDF files, and covers Healthy Eating, Fitness, Smoking and Drinking, Sleep, and Back Pain. These are all general interest topics focusing on subjects which are likely to be of interest to your employees.

We have also included a further section on occupational health which will help your employees to understand how their occupational health service works and can help them and their colleagues by providing access to a wide range of services and programmes.

Health Management’s clinical team carries out research on publicly available sources of information to support employees’ health, well being and rehabilitation. “Health Matters” provides links to a range of preferred and selected websites. This will help your employees to find out more about topics of specific interest to them without having to spend hours looking for “official” or “approved” websites.

### How it works

#### Stage1

The following link should also be given as part of the briefing to ensure employee’s have access to your personalised site. The code is HM001.

<http://www.healthmanltd.com/healthmatters/leicestercc>

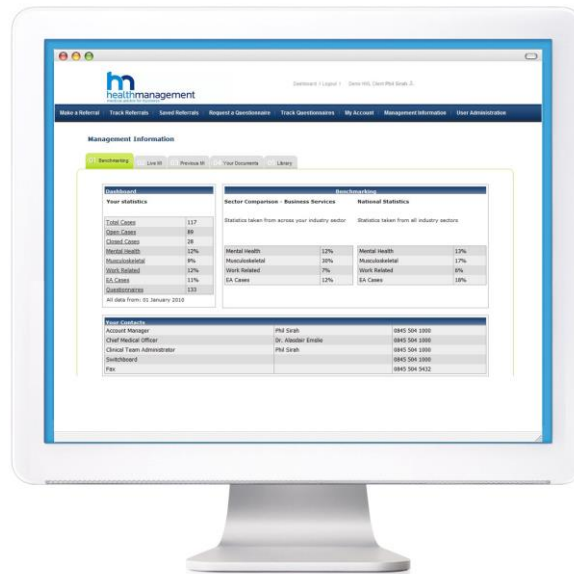
#### Stage2

We will update the web site on a regular basis and inform you of the highlights in the form of regular electronic briefings and posters which you may then choose to market to employees as part of an ongoing wellness campaign or simply allow them to review as and when.



## 7. Management Information

If the person responsible for your OH service has given you access to the Management Information Dashboard on HML Online, you will be able to see the following information:



Client MI Dashboard

### Dashboard

This section provides a live summary of all the cases referred to Occupational Health by your organisation. It will also confirm the percentage of cases linked to the four key areas: Mental health, musculoskeletal, work related and Disability Legislation implications.

This report also provides comparative benchmark data against your business sector and across all cases managed by HML.

Reports can be exported to Excel or PDF.

### Anonymised Company Summary Reports

By selecting specific data periods you are able to create statistical reports which provide detailed overviews on each area of your service, either management referrals or health assessment questionnaires.

The statistical data from the portal is presented in a similar format to the annual information that we provide you in hard copy and the reports can be exported to Excel or PDF.

### Manager / Employee Guides

This section contains a library of training and guidance notes for HR, Line Management and employees.

## 8. Confidentiality and Medical Ethics

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Occupational Health services are subject to a range of statutory restrictions that ensure patient confidentiality and protection of sensitive medical information. We have summarised some of the key points below:

Medical reports from us will **not** include clinical details about diagnosis, treatment or symptoms without the informed consent of an employee.

Managers will receive reports from us in relation to the referred employee **only** in the following areas:

- Is fitness for work related to an underlying medical condition?
- Is any ill-health absence worsened or caused by work?
- When is the likely return to work date?
- Do any restrictions apply to the employee?
- What adjustments could be made to the job, hours of work or work environment, which would help the employee attend and perform well
- What is the future likely attendance pattern going to be?
- Is the employee fit for promotion?
- Is the employee eligible for ill-health retirement benefits/ permanent health insurance when appropriate?

Given the sensitive nature of medical information, the organisation and Health Management must comply with the following provisions:

### Medical Records

All medical records are held by us. These are held centrally, securely and confidentially in accordance with the regulations relating to the Data Protection Act and the Access to Medical Reports Act.

Access to clinical data will be restricted to occupational health professionals only.

### Written Consent

Informed written consent of employees is required before access to clinical information may be granted to others, unless disclosure is required by law, or is in the public interest.

### Health Assessment Questionnaire (HAQ) / Addendum

Medical information provided by prospective employees is confidential and should be forwarded directly to us rather than to the organisation.

Reports from us will be given in general terms and only in relation to an employee's fitness for work.

### Obtaining GP / Specialist Reports

This is covered by the Access to Medical Reports Act 1988. A summary of the employee's rights is provided on the Consent Form.

### Employee access to Medical Reports

Under the Data Protection Act patients have access to their medical records. In most cases this will also include management reports prepared by us.

### Independent Medical Assessments

The examining physician is responsible for obtaining consent from the employee at the time of the medical examination to prepare a report for Health Management.

## **Management Referrals**

It is good practice for managers to inform employees, when and why they are referring them to us. There is a space on the Referral Form to confirm that this has occurred.

## 9. Employee Rights and Consents

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Employees have certain rights under the Access to Medical Reports Act 1988 and the Data Protection Act 1998 which are explained below.

This section explains these rights and the consents required by us to obtain and process health related data from an employee or a GP/ Consultant.

### Data Protection Act 1998 and Access to Information

The general information we ask about employees is known as “personal data”. Information about health, medical history and any treatment received is known as “sensitive personal data” and due to the sensitive nature of this data a number of procedures need to be adopted:

1. Informed consent is required in writing to obtain and process any health related information. Before personal and sensitive information can be processed a Consent Form must be completed. A summary of the employee’s rights is provided on the Consent Form (HM40).
2. An employee can ask for a copy of their medical reports, and this may include a copy of the independent medical assessment report, if one has taken place.
3. If an employee wants access to their medical records, the request must be made in writing to Health Management. A security check will be made to verify the identity of the employee seeking the information and a charge may be made for the release of information.
4. If an employee believes their medical records are inaccurate or misleading they can request that the record is corrected or that an amendment is attached to the record.

### Access to Medical Reports Act 1988

These are the employee’s rights, which should be carefully explained to the employee before they are referred to us and give their written consent to a report being provided to us by their GP/Consultant.

An employee can withhold their consent to us having access to any medical report. However, it is in the employee’s best interest to provide consent otherwise a medical opinion may have to be formed on limited information.

The employee can see the report before it is sent to us and during the six months after completion of the report, if they wish. If they want to see the report before it is sent to us, we will tell the doctor in writing when the request for the report is made and will notify the employee directly of the date of the request. This may delay the Management Referral report we issue to you.

We will tell the GP/Consultant that:

- The report must not be released in under 21 days unless the employee has written that he does not want to see it; or
- The employee has seen the report, consented to its being supplied (and, if relevant, has attached a statement to it).

If 21 days have passed since the date of the request and the employee wants to see the report before it is sent to us, it is the employee’s responsibility to liaise directly with their GP/ Consultant.

The GP/Consultant can make a charge if a copy of the report is required. If the employee changes their mind and wants to see the report after it has been provided to us, the employee has the right to seek access to it from the GP/Specialist at any time up to six months after it was supplied.

### **Exemptions in the Access to Medical Reports Act 1988**

The GP/Consultant is not obliged to show the employee any part of the medical report if that disclosure would, in the GP/Consultant's opinion, be likely to cause serious harm to their physical or mental health. Similarly, if a report reveals information about a person other than the employee, that part of the report will not be disclosed.

Where the exemptions apply, the GP/Consultant must inform the employee in writing that access is being denied but that access is still allowed to any part of the report not covered by the exemptions.

### **Difference between the types of information**

The reason why different access rules apply between a GP/Consultant's report and our report is because the GP/Consultant's report relates to medical reports created by those directly responsible for treatment and care.

Independent doctors who examine the employee to form an opinion and record it in a report to us are **not** responsible for treatment and care. However, you should be aware that the information forms part of an occupational health record and the employee has a right to see this under Data protection legislation.

### **Independent Medical Assessment Consent**

If an employee is asked to attend an independent medical assessment by an occupational physician who is not directly responsible for their care, the purpose of the examination must be explained to the employee.

The employee will be asked to sign an IMA Consent Form at the time of the appointment:

- To agree to the examination being carried out.
- To authorise the examining occupational physician to directly release medical information from the assessment to the OHS and for the OHS to interpret the information to be released to the Manager at the organisation.
- To authorise the OHS to release medical information from the assessment to their GP/Consultant and other medical specialists, if necessary.

### **The GMC guidelines introduced in 2009**

Although not law, the guidelines introduced by the General Medical Council (GMC), have been adopted by Health Management as they ensure we always work within best practice protocols.

These guidelines now allow employees the option to see their advice report before it is released to the Client (or third party) however it does not give them any rights to request or demand changes to the advice report. Health Management's protocols allow employees to state their preference to see the report before their employer, at the same time as their employer or not to see it.

## 10. Appendices

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- 10.1 An Employee Guide to “The Independent Medical Assessment”
- 10.2 Terminology and Acronyms
- 10.3 HML Online Guide

## 10.1 A guide to your Independent Medical Assessment (IMA)

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### What is occupational health?

The occupational health service is an independent, confidential health service provided by Health Management Ltd. Your organisation has a duty to care for your health and safety at work and is committed to developing a healthy workforce.

The occupational health service is delivered by a team of health professionals who have training in occupational medicine, the branch of medicine that deals with the relationship between your work and your health. Working to high professional standards, you can expect the team to treat you courteously and with respect for your privacy and dignity.

Our aims are to:

- Enable the rehabilitation of employees returning to work following ill health.
- Assist employees to achieve good health by providing health advice and support.
- Prevent employees from becoming ill as a result of the work they do.

The occupational health team will also work in partnership with you and your employer to resolve issues in the workplace that might have an adverse effect on your health. Together we hope to ensure that your well-being at work is maintained and given the priority it deserves.

### Will this assessment replace the care I am receiving from my doctor/specialist?

No, the OH service is not responsible for your medical care. That continues to be the responsibility of your own GP or Specialist.

The OH team may co-ordinate with your GP to ensure continuity of care but they do not replace his/her service. However this will only ever be done with your consent.

### Your appointment details

If you have been referred to the occupational health service, Health Management will arrange an appointment for you to see a doctor close to where you live or work. Sometimes it may be necessary to travel further depending on the availability of appointments in your area.

Consultations take between 30 minutes and an hour. Sometimes a little longer if the issues are complex. Your HR or line manager will pass you details of your appointment confirming the date, time, location and name of doctor.

Should you require assistance upon arrival at your IMA please inform us prior to the appointment and we will organise the appropriate provision.

If you are not sure why you have been referred, please ask your HR/Manager to clarify this.

Your HR/Manager will also have additional information regarding confidentiality of your information and your rights which they will share with you.

Prior to your assessment Health Management may have written to the doctor who is due to see you (an occupational physician or, in some cases, a different type of specialist) to explain the circumstances to your referral and to clarify the questions that the consultation is intended to address it.

If you are not happy for this to occur then you should advise your line manager or your HR representative immediately, but this may mean that Health Management is not able to gather the information that they would need in order to advise on your case and in those circumstances your employer would not have the benefit of occupational health advice which is unlikely to be in your best interests.

Please note that should you not arrive for your appointment we will need to inform your organisation of the missed assessment and this will also result in a charge to your organisation too.

### **What information should you take?**

In order to obtain the best advice from the medical assessment we would recommend where possible you consider taking the following information for the examining doctor:

1. Details of any current prescription medication from your doctors.
2. Copies of any relevant health information, such as diabetic glucose monitoring diaries, peak flow diaries for asthmatics, mood diaries for psychological disorders if relevant.
3. Names of any specialists you are under the care of and details of any forthcoming outpatient appointments or operation dates awaited.
4. If you have had any recent reports of investigations, blood tests, X rays or scans, it would be very helpful to know if these demonstrated any abnormalities. (you may wish to ask your GP about this).
5. Details of how long your current medical certificate runs if relevant.

If you wear glasses or a hearing aid then please do bring these with you

### **When you arrive**

Please ensure that you bring your appointment letter to your assessment.

Please try to arrive in good time for your assessment. If you are delayed it may not be possible for the doctor to see you that day and another booking may need to be made. This will result in a cancellation fee being incurred by your employer.

Please note that children are **not** allowed to be present during the assessment, and there are no childcare facilities available.

### **Your medical assessment**

The doctor will first discuss with you what their role is, explain the purpose of the assessment and the confidential nature of the assessment.

The doctor will have received details from Health Management concerning your illness and reasons for the referral. They may well ask you questions about your job role and then they will assess your specific health issues.

The doctor will also ask you to complete a consent form, which asks for your consent to release a medical report about the assessment to Health Management and designated officers within your organisation.

In many cases, the consultation will include only a relatively short medical assessment and will rarely require a full physical examination.

During your assessment the physician may undertake a limited physical examination. If you would prefer a chaperone to be present, in case that is required, you are welcome to bring a suitable person with you for your appointment.

### **Is the assessment confidential?**

As with all medical professionals, the occupational health team work within strict guidelines regarding medical information and confidentiality.

Your explicit consent is required for all the stages identified on the consent form without which an Occupational Health Report cannot be produced to your employers.



Your line manager/HR has additional information on this point should you require any clarification

Please be aware another clinician may audit your case for quality purposes to ensure all our clinicians work to best practice standards and to participate in national clinical audit. When this is undertaken anonymised information may be provided but this will not contain any personal identifiers and will not be linked to any individual and no personal data is shared.

### **What happens next?**

Following the consultation, a medical report will be sent to Health Management, normally within 5 working days, which will be interpreted by the occupational physicians at Health Management who will have detailed knowledge of your organisation and work practices. The Health Management Occupational Health Doctor will provide a report without unreasonable delay and in a manner which is not biased towards the employee or the employer.

He or she will send a report to your HR/Manager, or designated referrer, which will answer the questions raised in the referral, and usually contain a brief description of your illness, recommendations about the sort of work for which you are fit and any adjustments to your duties which are needed on medical grounds.

Usually the report will cover questions about the likelihood of you rendering reliable service and attendance to your employer in the future and whether your case can be managed administratively in line with the organisation's procedures and policies.

The examining doctor will summarise his/her conclusions to you at the end of the consultation; and in the case of HML run clinics may write directly to your employer covering the issues above.

Should you wish to receive a copy of the management report before or at the same time Health Management sends it to your employer, please let the examining doctor have your email address so that this can be added to the consent form. If you do not have an email address please advise the examining doctor of your postal address.

## 10.2 Terminology and Acronyms

<b>AMRA</b>	<b>Access to Medical Reports Act.</b> Allows employees to see any report produced by their GP or Specialist before it is sent to us.
<b>CEWG</b>	<b>Comparable Exposed Worker Group.</b> A grid of all health surveillance required within an organisation, organised by job role or function.
<b>CMO</b>	<b>Chief Medical Officer.</b> You have a nominated CMO who advises you on particular cases, policy and protocol development, risk management and OH procedures.
<b>SDA</b>	<b>Service Delivery Administrator.</b> Your day to day contact with the OH service.
<b>DSE</b>	<b>Display Screen Equipment.</b> Compliance with this regulation requires an organisation to offer eye tests to all employees who regularly use monitors/screens as part of their everyday work, if requested.
<b>GP / SPECIALIST REPORT</b>	<b>A medical report obtained from either the employee's GP or Specialist Consultant</b> that will require written consent to obtain and falls under the Access to Medical Records Act.
<b>HASAW</b>	<b>Health and Safety at Work Act.</b> Including Management Responsibilities introduced in '92.
<b>HAVS</b>	<b>Hand Arm Vibration Syndrome.</b> Condition brought on by the use of certain equipment and machinery over a period of time.
<b>IMA</b>	<b>Independent Medical Assessment.</b> Carried out by our network of OH Physicians under instruction from the CMO.
<b>OHA / OHNA</b>	<b>Occupational Health (Nursing) Advisor.</b> An OHA will carry out pre-employment screening and health surveillance programmes.
<b>OHP</b>	<b>Occupational Health Physician.</b> We use OHPs from our nationwide network to ensure your employees receive an independent assessment from a physician trained in occupational medicine.
<b>RTWI</b>	<b>Return to Work Interview.</b> Recommended as part of the employees re-introduction or rehabilitation back into the workplace after a period of absence.
<b>WTD</b>	<b>Working Time Directive.</b> EU legislation that impacts on night-workers as well as a range of other employee issues.

## 10.3 HML Online Guide

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### Getting Started

You can access the HML Online portal at <https://portal.healthmanagement.org.uk>.

Before using the system you must register for an account.

To register for an account, open your web browser and type the following address into the address bar at the top of the screen.

<https://portal.healthmanagement.org.uk>

Press Enter – you will be taken to the log in screen below.

If you don't see this screen then please check the address carefully, it must be typed into the address bar at the top of your web browser exactly as it appears here.

A screenshot of a web form titled 'Online Referrals - Login'. The form has a light gray background and a thin border. It contains two input fields: 'User name' and 'Password'. Below the 'Password' field are two buttons: 'Logon' and 'Register'. At the bottom of the form, there are two blue hyperlinks: 'Forgot password' and 'Forgot username'.

Click the Register button.

You will be taken to the registration screen shown below. Enter the Verification code obtained from the Occupational Health E-Learning Course (eg Lcity 9999) and then use tab or click out of the Verification code box.

Please complete the registration form using your own details and work email address.

## Register New User

required fields

Verification Code

Company Name

Location

Title

First Name

Surname

Work Address

Work Post Code

Job Title

Contact Telephone No

Email Address

User name

Password

Password confirmation

Please type in the characters seen here

[register now](#) [Cancel](#) [Privacy & Terms](#)

If everything has been entered correctly the screen should show your company name next to 'Company Name' and two further drop down boxes will appear; 'Select your manager' and 'Location'. If you receive a message stating 'Invalid Verification Code' please check your code and try again.

**Note: 'Manager' in this context means either your System Administrator for project or other nominated person in your HR hierarchy who will be able to track your referred cases. This is not necessarily your line manager.**

When selecting your Manager, if your line Manager isn't listed, select an appropriate HR Advisor or Martin Southam.

The Location drop down contains a pre-programmed list of locations entered by your agreed before launch. Please make an appropriate selection. Your email address must be your work email address. We can accept registrations only from email domains that have been previously registered with us for your organisation.

## Register New User

4 required fields

Verification Code

Company Name

Select your manager

Location

Title

First Name

Surname

Work Address

Work Post Code

Job Title

Contact Telephone No



Email Address

User name

Password

Password confirmation

Please type in the characters seen here

Type the text

[Privacy & Terms](#)

**Note:** Your password should be at least 10 characters long and must comply with the following password complexity criteria:

- Must contain at least one Uppercase character (A through to Z)
- Must contain at least one Lowercase character (a through to z)
- Must contain at least one number character (0 through to 9)
- Must contain at least one special character (! \$ # or a space character)
- Must not contain more than two of the same characters in a row (e.g. aa is ok, aaa is not ok)
- Must be 10 to 100 characters in length
- Must not contain the user name
- Must not be a common word (e.g. Password12)

Once you have completed the form including the click the Register Now button. You will receive an email from [online@healthmanltd.com](mailto:online@healthmanltd.com). This contains a link which you must click to activate your account. You will not be able to log into your new account until you activate it like this.

Once your account is activated please visit <https://portal.healthmanagement.org.uk> or follow the link on the activation screen to log on.

Online Referrals - Login

User name

Password

[Forgot password](#)

[Forgot username](#)

At the logon screen enter your username and password as per your registration and click the Logon button.

Once successfully logged in you will be taken to the dashboard. You may choose your next destination from here. You can always return here from any screen by using the navigation link to the Dashboard at the top of the screen in grey.

## Welcome to Health Management Online



### [▶ Make a Referral](#)

This form is designed for use by Human Resources professionals or Line Managers when referring a member of staff for occupational health assessment. It is important when making such referrals to include as much background information as possible to enable the clinical staff at Health Management to have a complete picture. Please feel free to telephone us if there is anything you wish to discuss before sending the referral and we will be pleased to advise you.

### [▶ Track Referrals](#)

This section provides a live snapshot of all cases referred to the OH service and allows you to drill down to view all the activity and progress of a case. This includes the history of Management Reports linked to each case which can be viewed or downloaded in Pdf form. Data can also be sorted or exported to excel.

### [▶ View Saved Referrals](#)

This section enables you to view all referrals that have been initiated, but not yet submitted. Please note that saved referrals will only be held for 30 days, after this time they will be automatically deleted for security reasons.

### [▶ Request a Questionnaire](#)

This section provides various risk assessment questionnaires for completion. In order to protect sensitive personal data, we ask that the form be initiated by Human Resources professionals or Line Managers, then subsequently completion by the individual concerned. This is essential in enabling us to follow appropriate user name & password protection procedures.

### [▶ Track Questionnaires](#)

This section provides a live snapshot of all questionnaires referred to the OH service and allows you to check the outcome/download the "fit" certificate. If the questionnaire is still being assessed, you are able to drill down and view all the activity and progress to date. Data can be sorted or exported to excel.

# Making a Referral

Click on the 'Make a Referral' link either from the blue down menu along the upper section of the screen.

Select Standard Referral (or select the type of referral that you wish to make). You may be presented with several options depending on which forms your organisation has chosen to use. You should select an appropriate form for the referral you will be making to avoid later delays.

You will be taken to the referral form as shown below. The actual form you see may be a custom version of this developed for your organisation. The form is split into several tabs.

**Standard Referral - Referrer's Details**

01 Referrer's Details | 02 Employee Details | 03 Reason for referral | 04 Information required | 05 Employee activities | 06 Supporting documents | 07 Declaration

All completed fields must contain at least 1 alphanumeric character. This form is confidential to Health Management Ltd. It should be completed by the Manager or Human Resources Department responsible for the employee. Required Fields

Title: Mrs  
Name: Alice Morton  
Company/Organisation: CSM Demo  
Job Title: Customer Service Manager  
Address for us to reply to: Ash House, The Broyle, Ringmer, East Sussex  
Postcode: BN8 5NN  
Telephone Number: 0845 504 1000  
Purchase Order No:  
Email Address: alice.morton@healthmanltd.com

save for later | go to next step

## Important Note:

For security reasons your session will expire after 20 minutes. Therefore if a case has been initiated and not submitted within that time, upon submission you will be ejected from the portal back to the login page and all information will be lost, so please save your work regularly. You can use the 'Save For Later' button at the bottom of any tab on the referral form to save a part completed form and so avoid losing your work, you may then retrieve and continue with the submission.

Progress through the steps completing all required fields (marked with a small blue triangle to the right hand side of the field).

At step 6 you may attach supporting documents such as a job description, absence history or consent forms. Attach documents by clicking browse and selecting a file from your computer in the same way as you might attach a file to an email.

**Note:** If you choose to use the "Save For Later" feature we will not keep any attached documents for you. You should only attach documents to a referral just before you are ready to submit it.





Note: Supported document formats are Word 2003, Word 2007, Word 2010, Excel 2003, Excel 2007, Excel 2010, Text and PDF. Submitting any other format, particularly older formats of office documents, may delay your referral as the Health Management admin team will be unable to process the case.

### Standard Referral - Supporting documents

01 Referrer's Details | 02 Employee Details | 03 Reason for referral | 04 Information required | 05 Employee activities | **06 Supporting documents** | 07 Declaration

All completed fields must contain at least 1 alphanumeric character. Please attach a job description and a copy of the individual's sickness record if available

Document 1	Cannot exceed 10 megabytes (mb)	<input type="text"/>	Browse...
Document 2	Cannot exceed 10 megabytes (mb)	<input type="text"/>	Browse...
Document 3	Cannot exceed 10 megabytes (mb)	<input type="text"/>	Browse...
Document 4	Cannot exceed 10 megabytes (mb)	<input type="text"/>	Browse...
Document 5	Cannot exceed 10 megabytes (mb)	<input type="text"/>	Browse...

[save for later](#)  [go to next step](#) 

Click the Submit Referral button on the last tab to send your referral to Health Management.

## Referrals: Save For Later and Rejections

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As mentioned above you can save a partially completed referral at any point prior to submitting it to Health Management. You will find your partially completed referrals in the Saved referrals section, accessible from the main blue menu bar at the top of the screen.

HML will store saved referrals in this section for 30 days, you will receive no prior notice when these saved referrals are deleted. Use the Retrieve link to reopen and complete the referral or choose Delete to remove it and discard the information saved so far.

**Note: If you had attached any documents to your referral before 'saving it for later' then these documents will not be saved with the referral. You will need to re-attach any documents to the referral prior to submitting it.**

Sometimes a referral can be rejected either by your HR or management team or by Health Management clinicians.

If one of your referrals is rejected then you will receive an email along the lines of the example below.

From: HML Online  
Sent: Thursday, December 06, 2012 10:12  
To: John Smith  
Subject: HML: Rejected referral  
Importance: High

Dear Adam Smith,

Your referral for Approval Queue has been rejected by Tom Smith for the following reason:

Inappropriate referral

You can find this referral in the "Saved Referrals" section of the portal website, from here you can make any amendments and resubmit the referral.

Kind Regards

Health Management Ltd

This email was sent from an unmanned mailbox.

If your referral is rejected it will appear in the Saved Referrals menu as below.

From here you can open, edit and re-refer or delete the referral.

**Saved Referrals**

**Rejected Referrals**

These are referrals which have been rejected by the health management team or by your line manager, you will have received an email detailing the reasons for this.

		FirstName	Surname	Position	Postcode
<a href="#">Re-Refer</a>	<a href="#">Delete</a>	Peter	Parker	Management Assistant	SE1 6TR

**You currently have no unsubmitted saved referrals.**

[home](#) ✓

**Saved Referrals**

		FirstName	Surname	Position	Postcode
<a href="#">Retrieve</a>	<a href="#">Delete</a>	Peter	Jones	Supervisor	BN8 5NN

**Saved referrals expire and will be deleted after 30 days**

**Rejected Referrals**

These are referrals which have been rejected by the health management team or by your line manager, you will have received an email detailing the reasons for this.

		FirstName	Surname	Position	Postcode
<a href="#">Re-Refer</a>	<a href="#">Delete</a>	Peter	Parker	Management Assistant	SE1 6TR

[home](#) ✓

You will find a copy of the rejected referral(s) in the Saved Referrals section as shown in the screenshot above. You may use the Re-refer link to open your referral to allow you to edit it and resubmit it to us. Note that if the reason for rejection was the use of an incorrect form then you will need to start over with the correct form rather than use this feature.

We will keep rejected referrals for 30 days in this section, again no prior notice will be given when this is deleted.

**Note: If you do not have any rejected referrals then the Rejected Referrals section of this screen will be hidden.**

# Requesting a Questionnaire

If you are using the 'Employee Led' model for questionnaires then you can ignore this section. To initiate a questionnaire under this model you will need to send the link and relevant questionnaire code, supplied to you by your Health Management Account Manager, to the employee.

If you are using the HR/Line Manager Led model for questionnaires, then you will need to complete the first part of the questionnaire form regarding the employee and their job function, before it is sent to your employee for them to add their responses regarding their health and medical history.

Please note the Online Health Assessment Questionnaire cannot be used for employees identified as Healthcare Workers, please speak to your Account Manager at HML for how we identify this worker type

Click on the 'Request Questionnaire' link from the blue drop down menu along the upper section of the screen.

Select the type of questionnaire that you wish to complete, eg Health Assessment Questionnaire (HAQ)

You will be taken to the questionnaire form. The form is split into several tabs.

Make a Referral | Track Referrals | Saved Referrals | Approval Queue | Request a Questionnaire | Track Questionnaires | My Account | Management Information | User Administration

### Health Assessment Questionnaire (HAQ) - About Referrer

01 About Referrer | 02 About Applicant | 03 Applicant Activities | 04 Send Form

All completed fields must contain at least 1 alphanumeric character.

Required Fields

Your Title	Mrs	←
Your Name	Alice Morton	←
Contact Tel No	0845 504 1000	←
Email Address	alice.morton@healthmanltd.com	←
Company/Organisation	CSM Demo	←
PO Number/Cost Centre		
Address for us to reply to	Ash House The Broyle Ringmer East Sussex	←
Postcode	BN8 5NN	←

go to next step ▶

Please work through the form completing all required fields. You will be required to enter the employees email address at the last step. Please check this carefully.

### Health Assessment Questionnaire (HAQ) - Send Form

01 About Referrer | 02 About Applicant | 03 Applicant Activities | 04 Send Form

All completed fields must contain at least 1 alphanumeric character.      You are now about to submit a partially completed questionnaire. An email will be sent to your prospective new employee notifying him/her that a form is ready for completion with a link to the Health Management online website. You can track the progress of this form on your dashboard but you will not be able to see any confidential medical information submitted by the individual at any stage.      Required Fields

Prospective employee's email address

[submit questionnaire](#)

The system will send an email to this address containing a link for the employee to click on in order for them to finish the form. Note that the employee will not be able to view your details on tab 01.

### Health Management Questionnaire Addendums

For some roles we require additional information on top of that collected by the basic questionnaire. These additional information sets are known as questionnaire addendums. They might be used for example where your employee is involved in vocational driving or perhaps they work with children or vulnerable adults.

Based on your responses to your part of the questionnaire the system will automatically generate the necessary addendums for the employee to complete.

# Tracking Cases

Once you have submitted a referral and it has been accepted and triaged by Health Management then you can track the progress of your case, there may be a delay of a couple of hours whilst this process is occurring in which you won't be able to see the case. You will receive an automated email when we accept the case.

## Tracking Referrals

Click on the Track Referrals button in the blue menu bar at the top of the screen.

The screenshot shows the 'Track Referrals' interface. At the top, there is a navigation bar with links: 'Make a Referral', 'Track Referrals', 'Saved Referrals', 'Approval Queue', 'Request a Questionnaire', 'Track Questionnaires', 'My Account', 'Management Information', and 'User Administration'. Below this, the 'Track Referrals' section has a search box for 'Open and Closed Cases' and an 'Export Referrals' button. There are three tabs: 'Open Cases', 'Closed Cases', and 'Pending Triage'. A 'Filter by User' dropdown is set to 'Curtis, Liz'. The main table has the following data:

Employee	Case Number	Division	Location	Department	Received	Status	Case Type	Owner	Recall Date	View
lane, web	CSM/OM/th2/43	CSM Demo	Manchester	Customer Services	22/06/2012 10:21:39	Triage Next Action - IMA Required	Mgmt. Referral	Liz Curtis		<a href="#">View</a>
Swift, Anne	CSM/OM/th2/41	CSM Demo	Manchester	Customer Services	22/06/2012 10:20:56	Triage Next Action - IMA Required	Mgmt. Referral	Liz Curtis		<a href="#">View</a>
Bloggs, Joe	CSM/OM/th2/39	CSM Demo	Manchester	Customer Services	22/06/2012 00:00:00	Triage Next Action - IMA Required	Mgmt. Referral	Liz Curtis		<a href="#">View</a>
Bee, Sany	CSM/OM/th2/42	CSM Demo	Manchester	Customer Services	22/06/2012 00:00:00	Triage Next Action - IMA Required	Mgmt. Referral	Liz Curtis		<a href="#">View</a>

Referral cases are split between Open and Closed cases. You may switch between these views using the tabs at the top of the table. If you have permission or are placed on the hierarchy to view cases created by your colleagues then you can use the 'Filter by User' drop down at the top right of the grid to simplify your view by limiting it to referrals made by a particular person.

You may use the search box at the top of this section to search directly by surname or case number for a particular case.

**Note: search results will only display cases you have permission to view.**

You can sort the table by clicking on any column heading. You can filter/search by any column by typing into any of the white boxes just below the column headings. *These boxes are known as the search/filter boxes.* You may search/filter by multiple columns. To clear a search / filter simply delete the contents of the relevant search/filter box.

If you are in the closed cases view then you should note that you are shown your own cases by default. If you have the necessary permission in the system you can use the Filter by User drop down at the top right of the grid to view closed cases belonging to your colleagues.

In the closed cases view you have the option to 'Re-refer' any case. This simply starts a new referral using the same form as the original case and completes section 2, employee details, for you.

Make a Referral | Track Referrals | Saved Referrals | Approval Queue | Request a Questionnaire | Track Questionnaires | My Account | Management Information | User Administration

**Track Referrals**

Search Open and Closed Cases

Open Cases | Closed Cases | Pending Triage

Filter by User:  ▼

Employee	Case Number	Division	Location	Department	Received	Status	Case Type	Owner	View	Re-Refer
Willis, Carole	CSM/OM/th2/44	CSM Demo	Manchester	Customer Services	22/06/2012 00:00:00	Closed	Mgmt. Referral	Liz Curtis	<a href="#">View</a>	<a href="#">Re-Refer</a>
Pepper, Peter	CSM/OM/th2/40	CSM Demo	Manchester	Customer Services	22/06/2012 00:00:00	Closed	Mgmt. Referral	Liz Curtis	<a href="#">View</a>	<a href="#">Re-Refer</a>

**Note:** Even if you have the necessary permissions to view cases from other users there is no facility to view all closed cases. This limitation is in place for performance reasons as a view of all closed cases from all users could be potentially very large and require a significant amount of data to be transferred from our web server to your computer.

### Exporting the Referral Tracking List

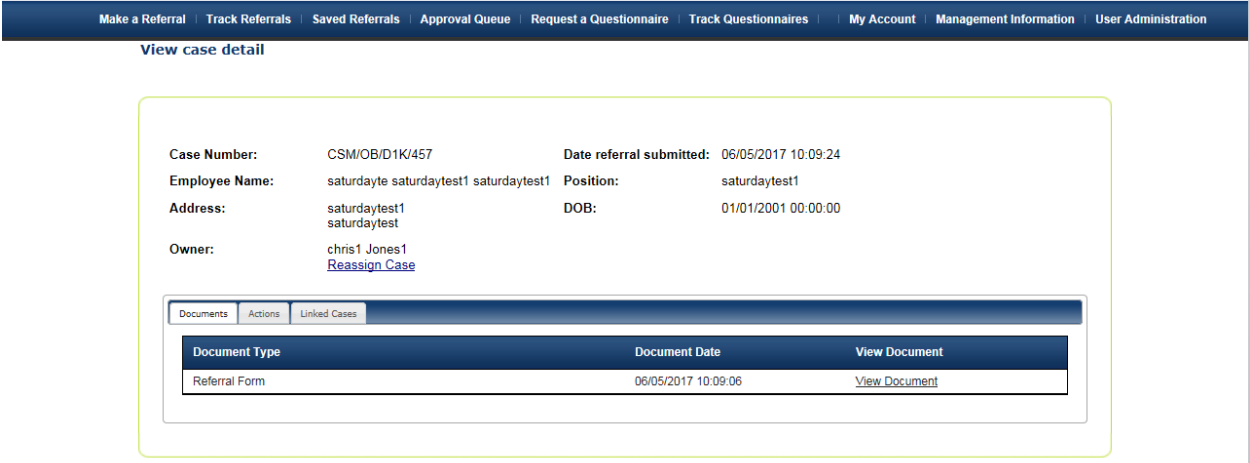
You may export the tracking list to an excel spread sheet by using the Export Cases button.

The spread sheet will contain two worksheets. The first worksheet contains your open cases list and the second your closed cases.

Click the Export Cases button, your spread sheet will be downloaded in your browser in the same way that you might download any file from the internet.

## Viewing Case Details and Case Documents

To view further case details, documents and collect outcomes click the 'View' link on the relevant row in the case tracking screen. This will take you to the Case Detail View screen as shown below.



The screenshot shows the 'View case detail' interface. At the top is a navigation bar with links: Make a Referral, Track Referrals, Saved Referrals, Approval Queue, Request a Questionnaire, Track Questionnaires, My Account, Management Information, and User Administration. Below the navigation bar is the title 'View case detail'. The main content area is enclosed in a light green border and contains the following details:

Case Number: CSM/OB/D1K/457      Date referral submitted: 06/05/2017 10:09:24  
Employee Name: saturdaye saturdaytest1 saturdaytest1      Position: saturdaytest1  
Address: saturdaytest1 saturdaytest      DOB: 01/01/2001 00:00:00  
Owner: chris1 Jones1  
[Reassign Case](#)

Below the details is a tabbed interface with three tabs: Documents (selected), Actions, and Linked Cases. Under the Documents tab is a table with the following data:

Document Type	Document Date	View Document
Referral Form	06/05/2017 10:09:06	<a href="#">View Document</a>

The top section of the case detail view screen provides some details of the referred employee and the case.

The bottom section of the case view is split into four tabs: Documents, Actions and Notes and Linked Cases.

The Documents tab provides you with a list of case related documents. You may click the View Document link to the right of any document to download and view it (Note Adobe PDF reader required).

In the example above you can see the referral Form that you originally completed in the 'Make a Referral' section of the application. If available you may also see an 'Attached Document' – this may be the document that was attached at Step 6 on the referral form. As noted previously you can attach up to five documents to a referral – they will all appear here as 'Attached Document'.

When a case outcome or advice letter is available you will receive an automated email from the system advising you of this. You will find the advice letter relating to your case in the same documents section of the view case screen. Most often cases with outcomes will be closed cases. Advice letters appear listed as 'Advice Letter' in the documents list. Sometimes you may see an advice letter with the message 'Awaiting employee response' in place of the View Document link. This indicates that the employee has requested sight of the report first which is allowed under GMC guidelines. In this instance, once the employee has viewed the document and confirmed that there are no factual inaccuracies then the 'View Document' link will appear.

Delivering documents to you in this way provides a much more secure alternative to email and provides a convenient reference for you if you ever need to refer back to a case in the future.

The Actions tab provides you with a list of any medical appointments or other further medical evidence events and their status. In the case of appointments you can see the date and time of the appointment and whether it is Open (pending), Closed (attended), Canx (cancelled) or DNA (employee did not attend).

The Notes tab is not currently used.

## Reassigning Cases to a new owner



If your organisation has chosen to allow you to reassign cases then you will see a link 'Reassign Case' in the Case Detail view. Please see the section relating to this later in this guide.

## Tracking Questionnaires

To track a questionnaire click on Track Questionnaires in the blue menu bar at the top of the screen. Questionnaire tracking is split into three tabs. The first tab lists questionnaires that have been requested and sent to the employee but not yet completed. The second tab shows questionnaires that have been accepted from the employee by Health Management but do not yet have an outcome, these will typically be cases where further medical evidence is required. The third tab lists closed cases; you will be able to collect Fitness Certificates from here.

Make a Referral | Track Referrals | Saved Referrals | Approval Queue | Request a Questionnaire | Track Questionnaires | My Account | Management Information | User Administration

**Track Questionnaires**

Search  Search

Pending Employee Completion | Open Cases | Closed Cases

Filter by User: All

First Name	Last Name	Submitted	Owner	Resend
TEST	TEST	30/06/2017 10:07:21	Janet Page	<a href="#">Resend</a>
TEST	TEST	03/07/2017 20:13:27	Janet Page	<a href="#">Resend</a>
TEST	TEST	03/07/2017 20:19:24	Janet Page	<a href="#">Resend</a>
test	test	15/06/2017 09:26:09	Kieran Fleury	<a href="#">Resend</a>
Alternate	Test	04/07/2017 11:00:00	Gillian Bonner	<a href="#">Resend</a>
TEST	TEST	29/06/2017 14:21:41	Elaine Paul	<a href="#">Resend</a>
TEST	TEST	29/06/2017 14:26:02	Elaine Paul	<a href="#">Resend</a>
Maria	Freyne	28/06/2017 16:09:51	Maria Freyne	<a href="#">Resend</a>
test	test	15/06/2017 12:59:48	Debbie Nicholls	<a href="#">Resend</a>
test	test	03/07/2017 11:13:15	Debbie Nicholls	<a href="#">Resend</a>
test	test	03/07/2017 12:01:26	Debbie Nicholls	<a href="#">Resend</a>
Amie	Cook	22/06/2017 10:03:52	Amie Cook	<a href="#">Resend</a>
xxxx	xxxx	22/06/2017 12:27:35	Amie Cook	<a href="#">Resend</a>

The first tab, Pending Employee Completion shows a list of questionnaires that you have sent to employees but have not yet been completed by them and accepted by the Health Management clinical team. There is a Resend link at the right of each row in this grid. You may click this to resend the questionnaire either to the same email address that you originally entered or to a new one.

**Note:** if you are using the 'Employee Led' questionnaire model then this tab is not relevant to you.

Make a Referral | Track Referrals | Saved Referrals | Approval Queue | Request a Questionnaire | Track Questionnaires | My Account | Management Information | User Administration

### Track Questionnaires

Search Open and Closed Cases

Pending Employee Completion | **Open Cases** | Closed Cases | Pending Screening

Filter by User: All

Employee	Case Number	Division	Location	Department	Received	Status	Case Type	Owner	Recall Date	View
test, test	CSM/SP/ES/560	Division A	Location A	Department B	16/12/2017 00:00:00	Triage Next Action	Online HAQ	Kieran Fleury		<a href="#">View</a>
cjtest, cjtest	CSM/OP/CJ7/282	CSM Demo	Birmingham	Customer Services	23/07/2015 00:00:00	Triage Next Action	Online HAQ	chris1 Jones1		<a href="#">View</a>

The second tab, Open Cases, allows you to track questionnaires that have been received and accepted by the Health Management clinical team but have not been immediately assessed as Fit. When this happens to a case you will receive an automatic email from the system informing you of this and requesting your permission for us to continue. If your contractual arrangement with us is that we automatically progress these cases then this email is for your information only. Otherwise please contact the admin team identified in the email. You may use the 'View' link to drill into each case to obtain further detail as described in the preceding section of this manual relating to tracking referrals.

Make a Referral | Track Referrals | Saved Referrals | Approval Queue | Request a Questionnaire | Track Questionnaires | My Account | Management Information | User Administration

### Track Questionnaires

Search Open and Closed Cases

Pending Employee Completion | Open Cases | **Closed Cases** | Pending Screening

Filter by User: Curtis, Liz

Employee	Case Number	Division	Location	Department	Received	Outcome	Case Type	Owner	Recall Date	View
welch, john	CSM/OP/th2/38	CSM Demo	Manchester	Customer Services	22/06/2012 10:19:36	Fit	HAQ	Liz Curtis		<a href="#">View</a>
do, sam	CSM/OP/th2/37	CSM Demo	Manchester	Customer Services	22/06/2012 10:19:10	Fit	HAQ	Liz Curtis		<a href="#">View</a>

From the third tab, Closed Cases, you may view each completed case and collect outcomes in the same way as described for referrals in the preceding section of this manual. You will receive an automatic email update when new outcomes or fitness certificates are available.

# Managing Your Account and Sharing Your Cases

The My Account feature is available to all users (unless your organisation has asked us to remove this) this allows you to edit your profile details and allow other users in your group to have sight of your cases in the case tracking screens if you have initiated this. Select the My Account menu option from the blue navigation bar at the top of the screen.

The screenshot shows the 'User Administration' section with two tabs: '01 My Details' (active) and '02 Shared Users'. The 'My Details' form includes the following fields and elements:

- Title: Mrs
- First Name: Alice
- Last Name: Morton
- Company Name: CSM Demo
- Address: Ash House, The Broyle Ringmer, East Sussex
- Postcode: BN8 5NN
- Job Title: Customer Service Manager
- Telephone: 0845 504 1000
- Email Address: alice.morton@healthmanltd.com
- Shared Services Request Code: [Empty]
- Username: alice.morton1
- Change Password: [Empty]
- Repeat Password: [Empty]
- Text: Please enter your current password to make any changes
- 

A password requirement note is displayed: "Your password must be a minimum of 8 characters and should contain both upper and lower case characters, and include at least one number".

This section is split into two tabs. On the first tab, My Details, you can edit the details that you registered with and you can change your password.

**Note: you will not be able to change your User Name or email. Please contact your HML Account Manager if your email address has changed to discuss the best way to facilitate this amendment. You will need to provide your current password in order to change your password.**

Click the Save Details button to save your changes.

The second tab, Shared Users, allows you to share your ALL cases both referrals and questionnaires with another user.

Shared Users

01 My Account Details 02 Shared Users

To share your cases with another user, select their name from the drop down list and click "Share Cases"

Alice Morton  Share Cases

First Name	Last Name	Username	Job Title	
Gillian	Bonner	gillian.bonner	Customer Service Manager	<a href="#">Unshare</a>
Amie	Cook	Amie Cook	CSM	<a href="#">Unshare</a>
Emily	Sinclair	xE.Sinclair	test	<a href="#">Unshare</a>
Debbie	Nicholls	debbie.nicholls	CSM	<a href="#">Unshare</a>

To share your tracked cases use the drop down box on the top right of the screen to choose another user in your organisation then click the Share Cases button. Shares will be listed in the table as above.

When you share cases with a colleague they will be able to track your cases and will also receive any automatic notification emails from the system in addition to yourself (the email function can be switched on or off so your colleagues just have visibility of the case rather than be copied into the associated emails) . If you wish to track their cases they then they must also share their cases with you.

The shared cases feature is useful if a colleague is taking a holiday or will be away from work for any amount of time.

If one of your colleagues is leaving your organisation it would be a good idea to get them to share their cases with an appropriate colleague so that their cases can continue to be tracked and notifications received. The Re-assign cases function can of course be utilised to move these cases to another user.

To stop sharing your tracked cases with another user simply select 'Unshare' next to their entry in the table.

# Password Reset

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If you forget your password then you may request a password reset by clicking on the Forgot Password link at the login screen.

A screenshot of the 'Online Referrals - Login' form. It contains two input fields: 'User name' and 'Password'. Below the fields are two buttons: 'Logon' and 'Register'. At the bottom of the form, there are two blue hyperlinks: 'Forgot password' and 'Request username'.

Once you click the link you will be prompted for the email address that you registered with.

A screenshot of the 'Forgot password' form. It features the Health Management logo at the top. Below the logo, the text 'Forgot password' is displayed. A light green rounded rectangle contains the instruction: 'Please enter your email address, you will receive an email with instructions on how to reset your password'. Below this instruction is a label 'Email Address:' followed by an input field and a dark blue 'Submit' button with a right-pointing arrow.

Click submit. You will receive an email containing a link which you may use to reset your password.

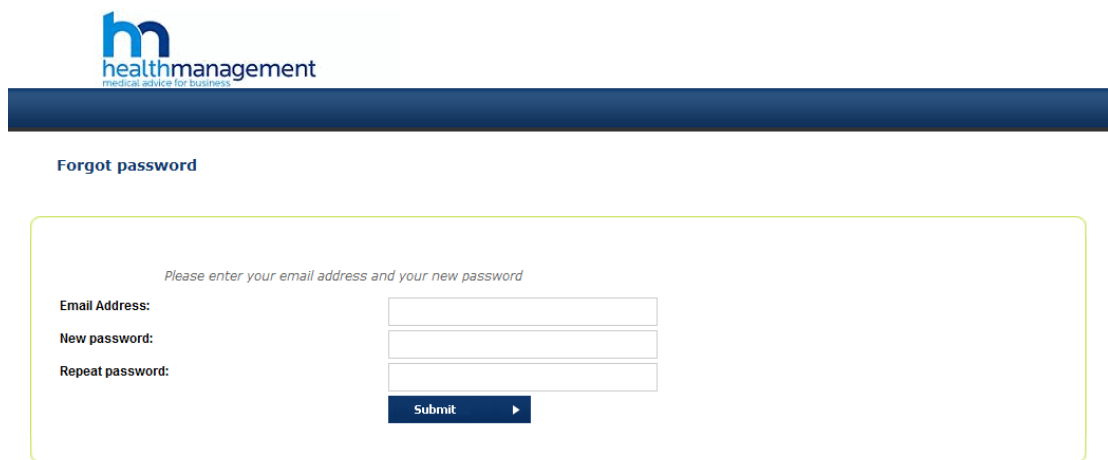
An example of this email is shown on the following page. The email will come from [online@healthmanltd.com](mailto:online@healthmanltd.com).

A password reset was recently requested using your email address, to reset your password, please click the link below

[Click here to reset your password](#)

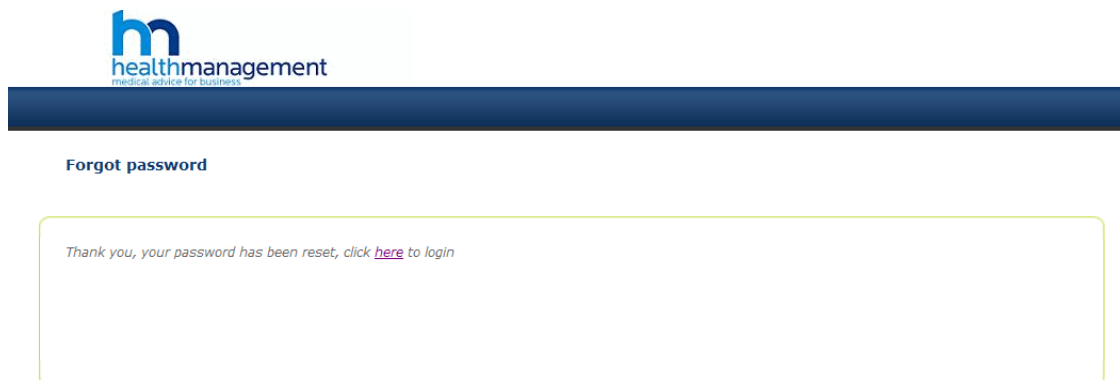
The above link will be valid for 24 hours after the request was initiated, after this time, you will have to re-request your password.

Follow the link in the email:



The screenshot shows the 'Forgot password' form. At the top left is the Health Management logo with the tagline 'medical advice for business'. Below the logo is a dark blue horizontal bar. The main heading is 'Forgot password'. A light green rounded rectangle contains the form instructions: 'Please enter your email address and your new password'. There are three input fields: 'Email Address:', 'New password:', and 'Repeat password:'. A dark blue 'Submit' button with a right-pointing arrow is located at the bottom right of the form.

Complete the form to reset your password and click Submit.



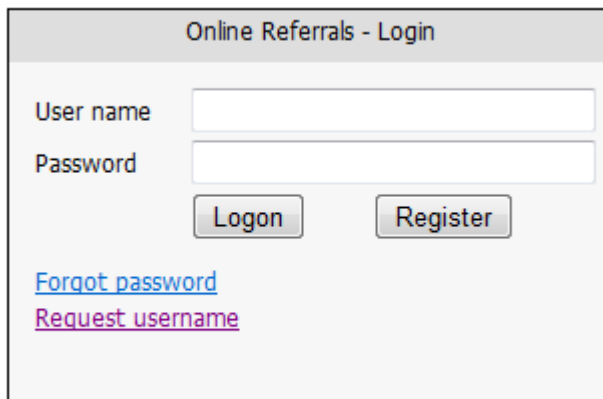
The screenshot shows the confirmation screen after password reset. It features the Health Management logo and tagline at the top left, followed by a dark blue horizontal bar. The heading is 'Forgot password'. A light green rounded rectangle contains the message: 'Thank you, your password has been reset, click [here](#) to login'.

Click the 'here' link to return to the login screen and login with your new password.

## Username Reminder

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If you have forgotten your username click on the Request Username link on the login page.



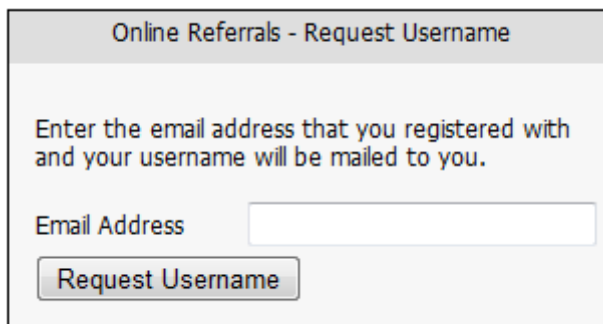
Online Referrals - Login

User name

Password

[Forgot password](#)  
[Request username](#)

At the next screen enter your registered email address to receive a reminder of your username by email

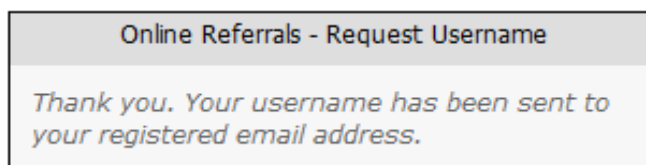


Online Referrals - Request Username

Enter the email address that you registered with and your username will be mailed to you.

Email Address

Once the email has been sent you will see the following confirmation.



Online Referrals - Request Username

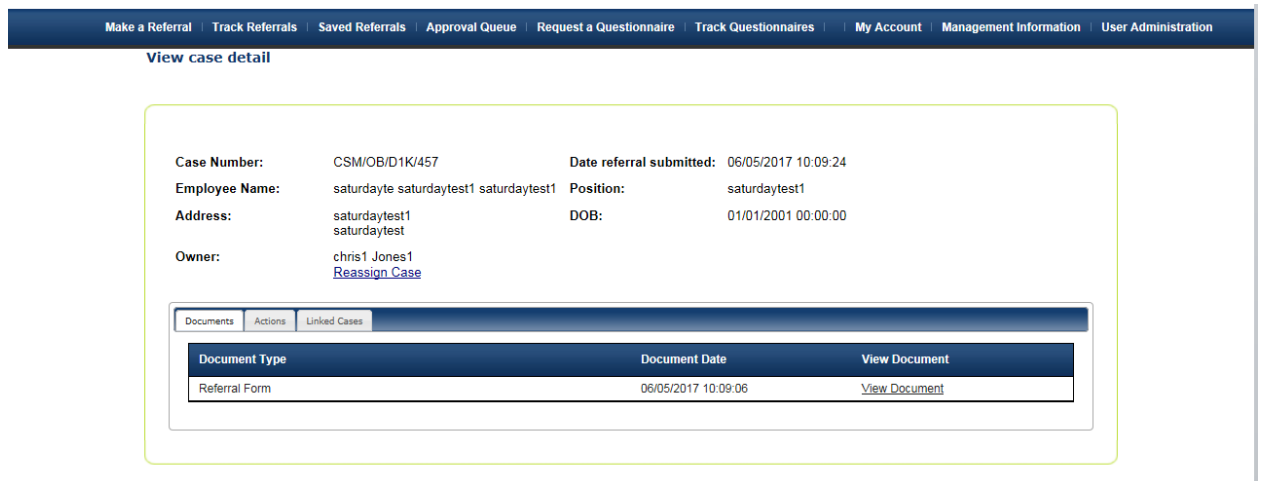
*Thank you. Your username has been sent to your registered email address.*

# Additional Permissions & Advanced Functions

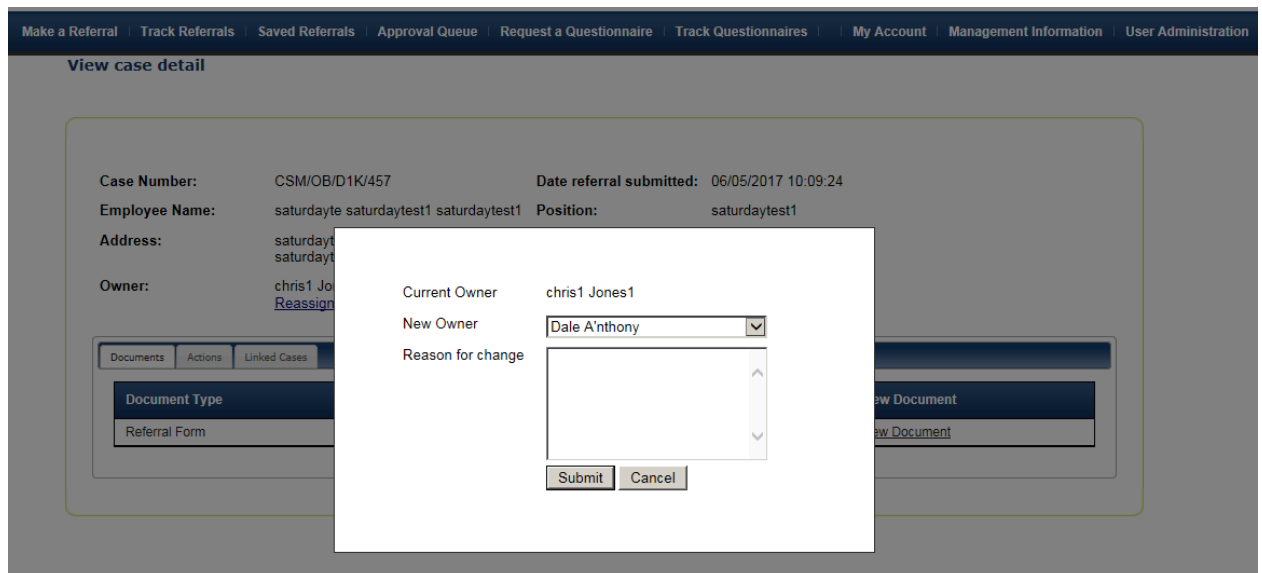
## Reassigning Cases

If your organisation has chosen to allow you the additional permission to reassign cases then you will see a link 'Reassign Case' in the Case Detail view. You might reassign a case if an employee moves from one department to another and their new manager wishes to have visibility of the case.

The new owner will be able to track the case and will receive all future correspondence concerning the case if the case is open.



To assign the case to a new owner in your organisation simply click the 'Reassign Case' link, you will be prompted to record a reason for the change.



You will also be able to reassign ALL cases from one user to another, for example if there is a change of line manager in an area or department. To facilitate this change you must have the additional permission of 'User Administration' in addition to 'Reassign Cases'

From User Administration > All Users you will see the list of registered users if you wish to reassign cases click on the 'Reassign cases' link to the right of user who you wish to remove the cases from.



User Administration - All Users - Export Users

01 All Users 02 Locked Users 02 User Shares

Full Name	Username	Job Title	Account State		
Vanessa Adshead	vanessa.adshead	Customer Service Manager	Active	<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Wendy Armstrong	wendy.armstrong	Customer Services Manager	Disabled	<a href="#">Enable</a>	<a href="#">Reassign cases</a>
Maxine Baker	maxine	Account Manager	Disabled	<a href="#">Enable</a>	<a href="#">Reassign cases</a>
Gillian Bonner	gillian.bonner	Customer Service Manager	Active	<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Brett Bylett	brettbylett	Database Administrator	Active	<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Lisa Coleman	lisa.coleman	Occupational Health Adviser	Active	<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Faye Cooper	fayecooper	HR Consultant	AwaitingActivation	<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Claire Cowan	claire.cowan.31	Account Manager	Disabled	<a href="#">Enable</a>	<a href="#">Reassign cases</a>
Catherine Cox	catherine.cox	Customer Services Manager	Active	<a href="#">Disable</a>	<a href="#">Reassign cases</a>

You will need to select the new owner who is to receive the cases and your reason for this change, all cases open and closed will then be immediately moved to the new user.

Make a Referral | Track Referrals | Saved Referrals | Approval Queue | Request a Questionnaire | Track Questionnaires | My Account | Management Information | User Administration

User Administration - All Users - Export Users

01 All Users 02 Locked Users 02 User Shares

Full Name	Username	Job Title	Account State		
ADRIAN FURNELL 1	afurnell	Account Manager	Disabled	<a href="#">Enable</a>	<a href="#">Reassign cases</a>
Dale A'nthony	x			<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Vanessa Adshead	v			<a href="#">Enable</a>	<a href="#">Reassign cases</a>
Dale Anthony	d			<a href="#">Enable</a>	<a href="#">Reassign cases</a>
Dale1 Anthony1	C			<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Alex Arblaster	a			<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Wendy Armstrong	w			<a href="#">Enable</a>	<a href="#">Reassign cases</a>
Maxine Baker	n			<a href="#">Enable</a>	<a href="#">Reassign cases</a>
peter Bethel	p			<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Gillian Bonner	g			<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Brett Bylett	b			<a href="#">Enable</a>	<a href="#">Reassign cases</a>
kai-alert(firstname)- card	d			<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Andy Cardno	a			<a href="#">Disable</a>	<a href="#">Reassign cases</a>

Current Owner: Dale1 Anthony1

New Owner:

Reason for change:

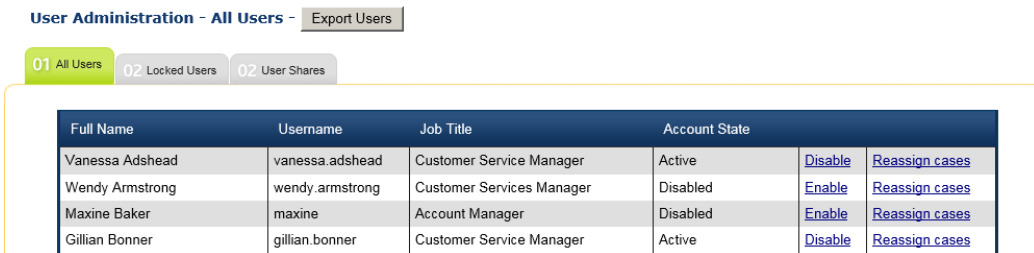
## User Administration

HML Online provides a way for a nominated person or persons to manage user accounts on behalf of your organisation. This enables you to act promptly to disable a user account should someone leave or change job role and also a way to unlock accounts where they have been locked out after 3 unsuccessful password attempts.

Additionally this section gives you visibility over sharing across your organisation and the facility to disable shares on behalf of a user.

Finally there is a special permission available which allows you to reassign case loads from one user to another. This may be appropriate for example when a manager moves into another role within the organisation and needs their replacement to have access to current and historical cases.

## Manage User Accounts



The screenshot shows the 'User Administration - All Users' section. At the top, there is a navigation bar with links: 'Make a Referral', 'Track Referrals', 'Saved Referrals', 'Approval Queue', 'Request a Questionnaire', 'Track Questionnaires', 'My Account', and 'User Administration'. Below this, there is a sub-header 'User Administration - All Users' with an 'Export Users' button. There are three tabs: '01 All Users' (selected), '02 Locked Users', and '02 User Shares'. The main content is a table with the following data:

Full Name	Username	Job Title	Account State		
Vanessa Adshead	vanessa.adshead	Customer Service Manager	Active	<a href="#">Disable</a>	<a href="#">Reassign cases</a>
Wendy Armstrong	wendy.armstrong	Customer Services Manager	Disabled	<a href="#">Enable</a>	<a href="#">Reassign cases</a>
Maxine Baker	maxine	Account Manager	Disabled	<a href="#">Enable</a>	<a href="#">Reassign cases</a>
Gillian Bonner	gillian.bonner	Customer Service Manager	Active	<a href="#">Disable</a>	<a href="#">Reassign cases</a>

The first section of the User Administration menu allows you to view and report on current user accounts and to disable or re-enable them as necessary

Use the Export Users button to download an Excel spread sheet containing a summary of all users for your organisation, their current status and their last login date and time.

To disable any particular account click the Disable link on the right of the user list

To re-enable a previously disabled user account, click the Enable link.

If you have an additional special permission you are also able to reassign ownership of cases from one user to another using the Reassign Cases link as shown above.

Reassigning cases should be used with care as you are effectively changing who has permission to view case details and who will receive all subsequent communications in relation to the cases. It is designed to be used when a manager changes role and their replacement needs access to case histories and current cases. Reassigning cases at this level changes ownership and visibility of all cases belonging to one individual to another.

If you require this functionality please speak to your Health Management account manager.

## Manage Locked Users

The second section of the user administration menu allows you to unlock accounts that have become locked out through three unsuccessful password attempts.

Please adhere to your own company policies whilst using this feature.

Full Name	Username	Job Title	Account State	
Alice Cruttenden	alicecrutt	Customer Service Manager	Locked	<a href="#">Unlock</a>

To unlock a user account simply click on the Unlock link

## Manage User Shares

As described in the HML Online User Guide any user may choose to share a view of their cases with another user. This is typically used when a user goes on holiday or extended leave and wishes a colleague to keep an eye on their current occupational health cases. Sharing is one way, if a user shares with another user then the original user does not get to see the cases belonging to the person they shared with unless that person also shares with them.

Please speak to your account manager for further information on sharing.

If you have this special administrative role then you can see who has shared with whom and you can disable any share on behalf of a user as necessary.

Full Name	Username	Job Title	Account State	
Sarah Gamble	sarah.gamble	CSM	Active	<a href="#">View shares</a>
Dale1 Anthony1	CSM1206	ME	Active	<a href="#">Hide shares</a>
Full Name	Username	Job Title	Account State	
Gillian Bonner	gillian.bonner	Customer Service Manager	Active	<a href="#">Remove Share</a>
Christopher Jones	CJones1	CSM	Active	<a href="#">Hide shares</a>
Full Name	Username	Job Title	Account State	
Janet Page	janet.page	Customer Service	Active	<a href="#">Remove Share</a>
Emily Sinclair	xE.Sinclair	test	Active	<a href="#">View shares</a>

Click the View Shares link next to any listed user to see who they are sharing with.

Click the Remove Share link to remove any individual share.

## Management Information

HML Online offers access to live management information and to your previously published Health Management Occupational Health Service Report packs. Note that individual tabs in this menu can be enabled or disabled per user so you may not see all features.

**Management Information**

01 Benchmarking 02 Live MI 03 Previous MI 04 Your Documents 05 Library

Dashboard		Benchmarking			
<b>Your statistics</b>		<b>Sector Comparison - Business Services</b>		<b>National Statistics</b>	
Total Cases		Statistics taken from across your industry sector		Statistics taken from all industry sectors	
Open Cases	41	Mental Health	22%	Mental Health	25%
Closed Cases	33	Musculoskeletal	34%	Musculoskeletal	26%
Mental Health	25%	Work Related	11%	Work Related	13%
Musculoskeletal	12%	EA Cases	26%	EA Cases	36%
Work Related	25%				
EA Cases	25%				
Questionnaires	28				
All data from: 01 January 2010					
Your Contacts					
Account Manager		Tim Skilton			
Chief Medical Officer		Mr Adrian Massey		0845 504 1000	
Clinical Team Administrator		IT Test		08455041000	
Switchboard				0845 504 1000	
Fax				0845 504 1066	

## Benchmarking

The first section in the Management Information menu of HML Online gives you access to benchmarking data and some useful contact details

The benchmarking allows you to compare key metrics in relation to your workforce with other organisations in the same market sector and also with all organisations from across the Health Management database.

Key benchmarking metrics are

- Percentage of total referred cases that were marked as Work Related cases
- Percentage of total referred cases that were marked as Equality Act cases
- Percentage of cases with an ICD10 categorisation of Mental Health
- Percentage of case with an ICD10 categorisation of Musculoskeletal

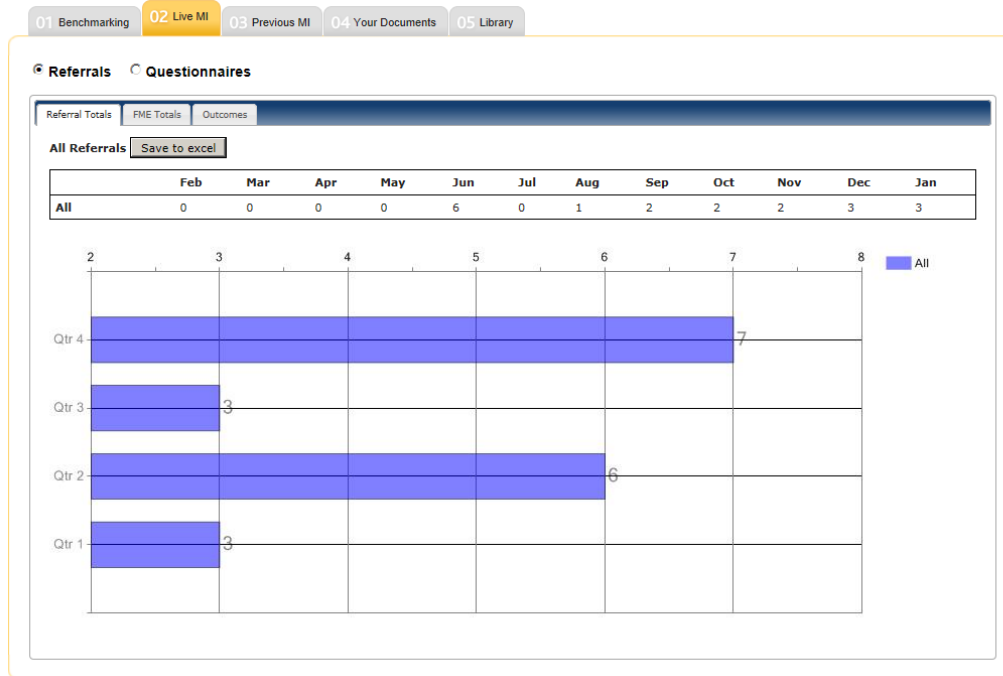
ICD10 codes are an international standard disease categorisation. All Health Management case will be assigned a single overall code at their conclusion.

The date range for this data will be from your contract start date or 1<sup>st</sup> January 2010 whichever was most recent.

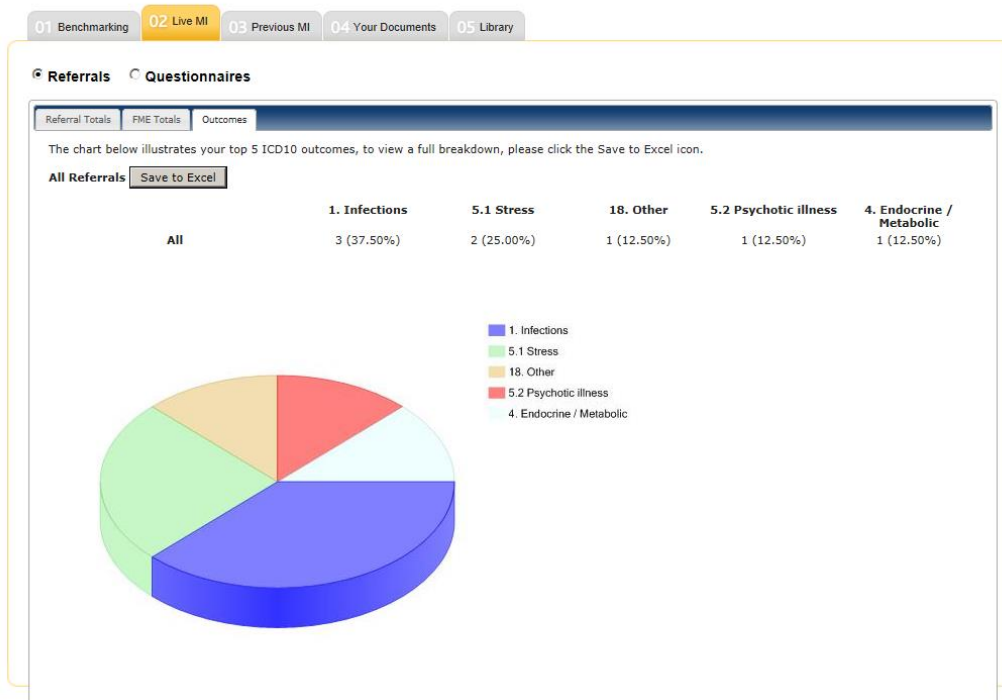
## Live MI

The second section in the Management Information menu gives you access to some live management information.

Specific metrics include case volumes, volumes of Further Medical Evidence (FME) that we have sought in the course of processing those cases and a breakdown of your top 5 ICD10 outcomes



### Management Information



## Previous MI

The next tab in the Management Information menu gives you access to the more comprehensive annual or quarterly reports that you already receive as part of your service

As well as delivering these reports to you using the usual channels your Health Management account manager will upload these reports to the Previous MI section allowing you to refer back to a library of reports over time.

**Management Information**

01 Benchmarking 02 Live MI 03 Previous MI 04 Your Documents 05 Library

Title	Type	Size	
MI Report 2011	PowerPoint Presentation	4579328	Retrieve...

To access any report in the list simply click the Retrieve button in the far right hand column to download a copy.

## Your Documents

The Your Documents section makes available to you related contract documents specific to you such as your contract handbook and perhaps PDF copies of the electronic referral forms. Use the Retrieve button to download a document.

**Management Information**

01 Benchmarking 02 Live MI 03 Previous MI 04 Your Documents 05 Library

Title	Type	Size	
A Guide to HAQ Addendums	Word Document	135168	Retrieve...
HM 30 - HAQ Form	Unknown	335872	Retrieve...
HM 3200 - Nightworker Form	Word Document	190976	Retrieve...
HM 40 - GP Consent Form	Word Document	146944	Retrieve...
HM 41 - Referral Form	Word Document	229888	Retrieve...

## Library

The last section of the Management Information menu provides you with access to our Occupational Health Library. This consists of a range of articles and guides written by Health Management Consultant Physicians aimed at both Managers and Employees.

### Management Information

01 Benchmarking 02 Live MI 03 Previous MI 04 Your Documents 05 Library

Managers Guides Employees Guides

Title	Type	Size	
Corporate Manslaughter	PDF Document	176642	Retrieve...
GMC Confidentiality Oct 2009	PDF Document	141260	Retrieve...
Obesity	PDF Document	171107	Retrieve...
Stress Management	PDF Document	170546	Retrieve...
A guide to Asbestos	PDF Document	148114	Retrieve...
A guide to Crohns disease	PDF Document	146461	Retrieve...
A guide to the Menopause	PDF Document	161598	Retrieve...
A guide to aspergers syndrome	PDF Document	166877	Retrieve...
A guide to Cancer	PDF Document	145692	Retrieve...
A guide to Cognitive Behavioural Therapy	PDF Document	132026	Retrieve...

### Management Information

01 Benchmarking 02 Live MI 03 Previous MI 04 Your Documents 05 Library

Managers Guides Employees Guides

Title	Type	Size	
A guide to Asthma	PDF Document	142526	Retrieve...
A guide to BBQs and food safety	PDF Document	150748	Retrieve...
A guide to breast awareness and screening	PDF Document	148193	Retrieve...
A guide to changing your diet for a healthier lifestyle	PDF Document	166685	Retrieve...
A guide to chickenpox	PDF Document	140310	Retrieve...
A guide to Cholesterol Levels	PDF Document	152433	Retrieve...
A guide to Colds & Flu	PDF Document	156001	Retrieve...
A guide to counselling	PDF Document	132034	Retrieve...
A guide to Deep Vein Thrombosis	PDF Document	153580	Retrieve...
A guide to Dementia	PDF Document	162293	Retrieve...

## Security

- Remember that security is your personal responsibility.
- Be aware of your surroundings when you enter your account credentials.
- Never leave a logged in account unattended.
- Always take appropriate care handling documents that you download from the web site.
- Never share your user name or password. The Health Management service desk will never ask you for your password. You should challenge and deny any request for this type of information.
- An unattended session will automatically log out after 20 minutes of inactivity.



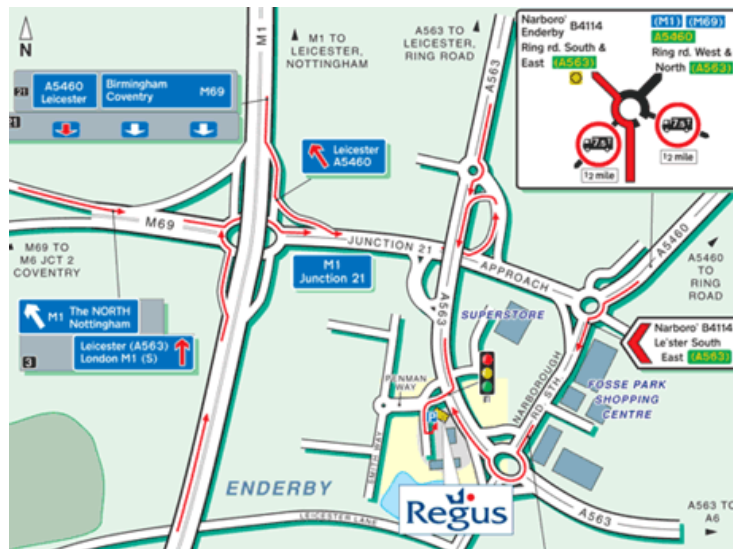
**Health Management Ltd  
Regus Centre  
1st Floor, Gateway House  
4 Penman Way, Grove Business Park  
Enderby  
Leicester LE19 1SY  
Telephone 0845 504 0230**

### Directions Public Transport

Direct trains run from London St Pancras to Leicester very frequently. From the City centre take the number 15 or 50A bus to Fosse Park.

### Directions by Car

Leave the M1 at junction 21 and at the roundabout take the exit for the A5460 signposted to Fosse Park. Take the first exit onto the A563, Ring Road - South and East and follow the road around to the left then at the next roundabout turn left. Take the second right turn signposted Business Park and you will see our building on your left, take the first left and then the car park entrance is on the left. The centre is less than a mile from the M1/M69 and approximately 5 minutes drive. From Leicester City Centre take the A5460 out of the City and then turn left onto the A563 just after Fosse Park, followed by a right turn onto Grove Park. The centre is approximately 15 minutes drive from the City Centre.



Please contact Health Management on 0845 504 0230 if you need further assistance with directions.

