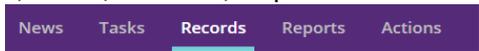# Navigating around the OH Referral Portal

This Quick Reference Guide provides a step by guide to navigating around the OH Referral Portal

1. Log in using your **Username** and **Password**
2. You will be taken to the home page. The home page will provide you with easy access to the services that you require and help you understand how to navigation through the system
3. The navigation bar features 5 individual tabs, News, Tasks, Records, Reports and Actions

News	Tasks	Records	Reports	Actions

4. Each tab has an associated navigation pane to the left of every page and provides a way of navigating around the section you are in
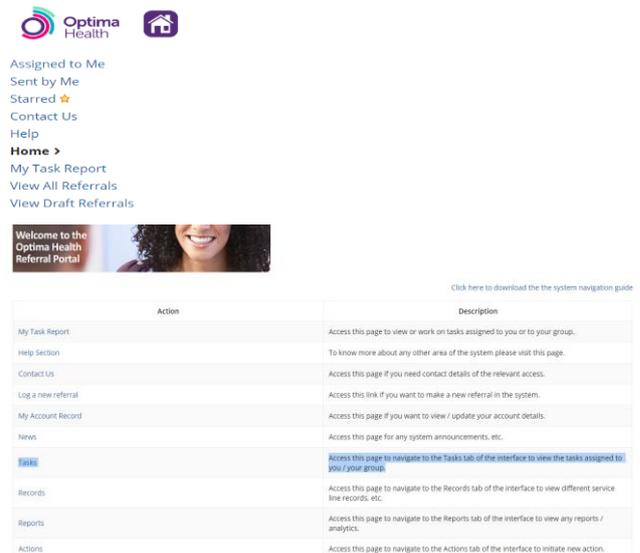
Tasks

5. **Tasks** will provide you with access to the following:

   - **Help** – gives you access to FAQ's and system userguides
   - **Contact Us** – provides details of your helpdesk number, opening hours and a link to send a message if assistance is required
   - **My Task Report** – this is where you would access tasks you have been prompted to complete i.e. Authorising a 3rd Party Referral
   - **View All Referrals –** on this page you can view any referrals you have made or you have authority to access **View Draft Referrals –** on this page you will be able to search, view, complete or cancel draft referrals

Records

6. The **Records** tab, gives you access to referrals that you have registered in the portal or are an additional manager for
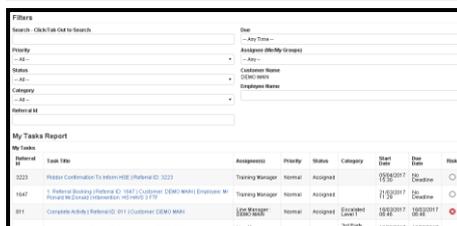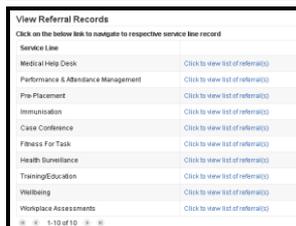
Navigating around the OH Referral Portal

- N.B. Depending on your user credentials you may also be able to view other referrals that have been raised for your organisation
- You can view referrals by service line i.e. Fitness for Task, Performance & Attendance Management, Health Surveillance
- View employee details
- View call records
- View messages
- View users & accounts

Actions

7. The **Actions** tab is where you go if you want to initiate a new action, such as:
   - **Advanced Employee Search**
   - **Create a New Referral**
   - **Initiate a Medical in Confidence Check**
   - **Recall Referral Details**
   - **Send a new message within the system**

Reports

8. The **Reports** area is where portal users are able to access management information relating to referrals that they are associated with or have access to
   - N.B. The functionality available via reports will initially be limited. Further development of the management information suite will take place post deployment

News

9. The **News** area will be used to for communications. Further development of this area of the portal is expected post deployment

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Records

Absences	List of Absences
Accounts	Record for Accounts
Call Records	Comprehensive list of all calls logged on the system.
Employees	Record for Employees
Events and 3rd Party Referrals	Comprehensive list of all referrals logged for Events and 3rd Party referrals
Fitness For Task Referrals	Comprehensive list of all referral logged for Fitness For Task
Health Surveillance Referrals	Comprehensive list of all referral logged for Health Surveillance
Immunisation Referrals	Comprehensive list of all referrals logged for Immunisation
Messages	Displays messages from Managers

Actions

News | Tasks | Records | Reports | **Actions**

All >
Starred ☆

APPLICATIONS
Medical Help Desk (1)
Optima Health Actions (4)
Subject Access Request (1)

⚡ **All Employee Search** ☆
Click the above link for advanced employee search

⚡ **All Referrals Search** ☆
Click to search for referral

⚡ **Create a New Referral** ☆
Select the above link to raise a new referral for a particular service line

⚡ **Initiate a new SAR Request** ☆
Click the above link to initiate a new SAR request in the system

⚡ **Recall Referral Detail** ☆
Click to Initiate Referral

⚡ **Send New Message** ☆
Send a new Message in the system

Reports

Search reports 🔍
All >

No reports available

News

Search news 🔍
All >
Updates
Participating
Kudos 🏆
Starred ☆

Click here to post...

System Announcement regression_session_02
19 Aug 2019 ☆ 🔒 Comment

System Announcement Testing...1...2....check...mic check 1 2
25 Jul 2019 ☆ 🔒 Comment

System Announcement for all users
15 May 2019 ☆ 🔒 Comment