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Issue Date	Mar 20	
Owner	Ops	



Manager Accounts

Work Instruction

For External Use

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Manager Accounts

Referrals are submitted using myOHportal, which is accessed at the following address:

www.myohportal.co.uk

All referrals will be made by the customer referring manager/s. Optima Health will then process the referral to the appropriate intervention. Throughout the life of the referral, and once the referral has closed, updates and reports can be viewed in myOHportal by the referring manager/s.

A manager account is created to allow an employee manager to have access to myOHportal. The account is predominantly used to make referrals, view live updates and review outcome reports.

There are three types of external user accounts. The account type is visible from the account summary screen.

- **Manager** – This is the most common type of account. A manager account allows the user to make referrals, view updates on referrals they have created (or are included as an additional manager on) and review outcome reports.
- **Case Coordinators** – Case coordinator accounts are provided to HR or a specific group / team of managers that require sight of all referrals. These accounts can also be limited to specific business units.
- **User Administrators** – These accounts are provided to users who have the authority to create Manager and Case Coordinator accounts within myOHportal. This account type does not have access to make or view referrals

A user profile will have at least one of the above account types or can have a combination of any of the three types, depending on your organisational requirements.

Information required to create an account:

Manager's full name, email address, job title, unique employee ID, and a contact number.

Please note, when using the self-creation functionality this will only create an account with Manager permissions. To request a Case Coordinator account, please refer to your User Administrator.

User Administrator accounts can only be created by Optima Health.

Creating a New Manager Account via the Self-Account Creation Process

Step 1

From the homepage select **Register New Account**.

Optima Health is a trading name of OH Assist Limited. Our Registered Office is Meadow Court, 2 Hayland Street, Sheffield, S9 1BY. We are registered in England and Wales with Registered Number 06621058. Optima Health is a trading name of Working on Wellbeing Ltd. Our Registered Office is Grosvenor House, Prospect Hill, Redditch, Worcestershire B97 4DL. We are registered in England and Wales with Registered Number 08544676.

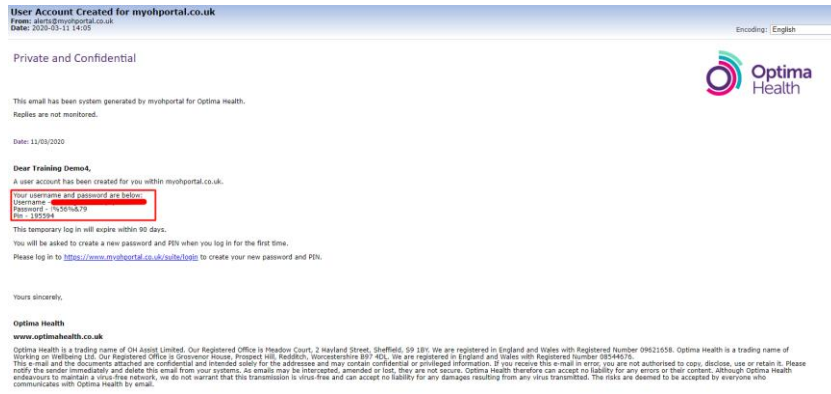
Step 2

The next page will ask you to complete the **registration** form with your (the manager) details.

Please note the email address entered will need to contain the pre-agreed **registered company domain for your organisation** e.g. @optimahealth.co.uk.

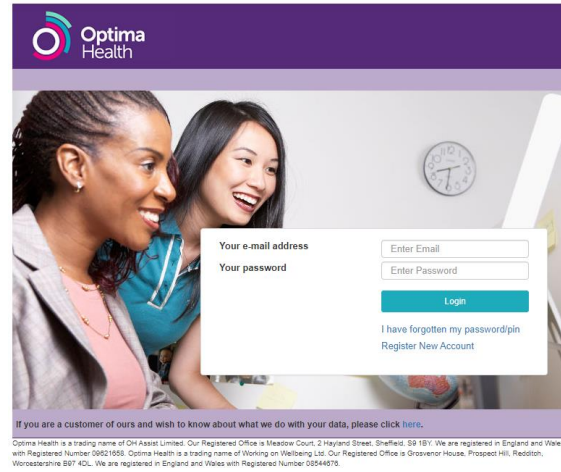
Step 3

Once you have completed all of the required fields and selected next you will receive an **email providing you with your log in details**. Please note it may take a few minutes for this email to arrive into your inbox.



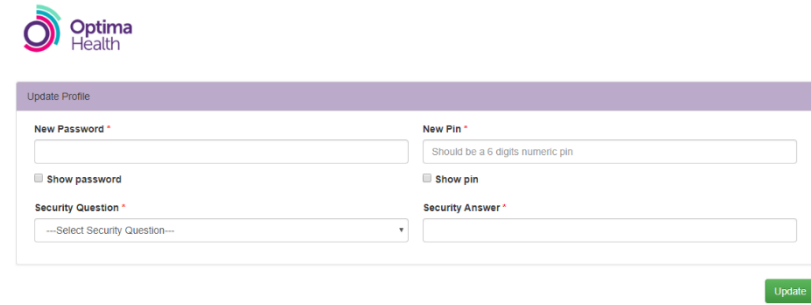
Step 4

Return to the myOHportal homepage and using the **username and password provided** log into the portal. We recommend that the username and password is typed, rather than copied and pasted from the email.



Step 5

You will be required to **create a new password and PIN** when you log in for the first time.



If you have any questions, please do not hesitate to contact your helpdesk.

Additional Information

Browser Requirements

Google Chrome is the recommended browser for best experience.

The full list of supported browsers is:

Browser	Comments
Google Chrome	myOHportal supports the most recent stable version.
Mozilla Firefox	myOHportal supports the most recent stable version.
Microsoft Edge	Edge is only supported on Windows 10.
Microsoft Internet Explorer 11	IE11 11 is supported on Windows operating systems and 8.x tablet. Running Internet Explorer in Enterprise or Document Mode to emulate older browser versions is not supported.
Apple Safari	Safari is only supported on Mac operating systems.

Inactive Accounts

Accounts that have been made inactive accounts, either by a User Administrator or through inactivity will no longer be able to log in to myOHportal. In order to reactivate an account a Case Coordinator or User Administrator will need to make the request to Optima Health before Optima Health will process the reactivation.

Optima Health will not know who leaves or moves within a customer organisation. Customers are responsible for ensuring that leavers and movers have their accounts deactivated or amended via the User Administrator function. The customer should establish a leavers and movers process to manage the accounts that their users hold.