

## MyOHportal FAQs (non-downloadable questions)

### How do I raise a referral to OH Assist?

To raise a referral to OH Assist, you will need to select **Log a New Referral** on the landing page, select the **service line** and **service** that you require, then follow the online referral questions. For assistance to support you through the referral process, please refer to the **Creating a Referral** quick reference guide.

### Why am I not able to add an additional manager to a referral?

To add an additional manager to a referral, you will need to ensure that when asked "**Would you like to add an additional manager to this referral?**" you have selected **Yes** as the response. A new field will appear to right of the screen which will provide you with the opportunity to add the email address of the secondary manager. You will need to start to type the email address of the secondary manager in the available field. If the secondary manager has a portal account, a match will be found and the email address can be populated. If the portal does not recognise the email address, it is likely that the manager you are attempting to add does not have a portal account. It is essential for a secondary manager to have an active portal account with an email domain that is associated with your organisation. Further details about how to add an additional manager can be found in the **Creating a Referral** quick reference guide (see below).

### What if there are no suitable appointments for me to select via online booking?

If there are no suitable appointments in online booking, close the newly opened booking tab and return to the booking task. Ensure that there are sufficient notes regarding the employee's availability in the field provided and select **Escalate Intervention** for OH Assist to review the booking task.

### How will the employee be notified of the appointment that I have booked?

The referring manager should initially seek consent to book a suitable appointment for the employee as part of the referral process and notify the employee of the date the appointment has been scheduled. If the employee has provided consent for OH Assist to make contact via SMS and/or email, notification of the appointment will be sent following the submission of the referral. An appointment letter will also be issued by post.

### How do I delete tasks that appear on my task list?

To remove a task from your task list, you will need to open the task and either **complete** the action required or **cancel** the task.

## How do I check on the progress of my referral?

To monitor the progress of a referral you will need to search for the referral via the **Records** tab, then view progress through the **Summary** screen and **Referral Interventions**. For additional support, please refer to the **Tracking a Referral and Obtaining a Report** quick reference guide.

## How do I retrieve a copy of the outcome summary report for my referral?

To retrieve a copy of the outcome summary report, you will need to search for the referral via the **Records** tab. The outcome summary report can be accessed by selecting **Documents** in the navigation panel. For additional support, please refer to the **Tracking a Referral and Obtaining a Report** quick reference guide

## Where will I find my draft referrals?

Unsubmitted referrals are saved in a draft format and accessed via your task list on the **Tasks** tab.

## How do I make changes to the notifications that I receive?

To make changes to optional notifications, you will need to access **My Account Records** from the home page. You will need to select **Related Actions** and then **Update Notifications Configuration**. Here you will be able switch off any non mandatory notifications and indicate whether notifications are received via SMS and/or email. For additional information about the process, please refer to the **Managing Your User Account** quick reference guide.

## How do I request an amendment to the report that I have received?

Upon receipt of an outcome summary report for a performance and attendance management referral, the referring manager will be issued a task to review the report and to advise whether they are satisfied. If dissatisfaction is recorded, OH Assist will commence with the amended report process. For all other service lines, please contact the Helpdesk to register your request.

## How do I make a complaint?

To make a complaint, please contact the Helpdesk.