

# Uploading a Document to an Open Referral



This Quick Reference Guide provides a step by step guide to Uploading a Document to an Open Referral

## If you know the Referral ID and the Service Line the Employee was referred for:

### for:

1. Log in using your **Username** and **Password**
2. Select **Records**
  - N.B. Every referral you have made or are associated with can be located in records
3. Select **Referral Type** i.e. Performance & Attendance Management Referrals
4. Using the search facility available , type in **Referral ID** and press **Enter**
5. The referral will be displayed
6. Select the **Referral ID** highlighted in blue
  - N.B. this will take you to the **Referral Summary Screen**
7. Select **Documents** from the menu to the left of the screen
8. Select **Manage Documents** Select **Add** and **Add New Document**
9. Select **Choose File** and navigate to the document you wish to upload, then select **Open**
  - N.B. Document needs to be saved as you would like it to be called in the system
10. Select **Document Type** from the drop down menu
11. Select **Add**, then **Yes**
12. Select **Finish**

### Records

**Performance & Attendance Management Referrals**  
Comprehensive list of all referrals logged for Performance & Attendance Management

**Performance & Attendance Management Referrals**

Showing search results for 17167

ID	Employee Name	Customer	Logged By
21788	Mr Enoch Thompson	Finance - NWR Training	Admin Lynn

**Training** Records: Performance & Attendance Management Referrals

**Mr Trainer2 Dixon20 - 17167** Add

Draft
Pending Approval
Pending Consent
In progress
Closed - all interventions complete

<p><b>Employee Details</b></p> <p>Name: Mr Trainer2 Dixon20 Gender: Male Date of Birth: 22 Mar 1989</p>	<p><b>Customer Name</b>: Training <b>Job Title</b>: Manual Labourer <b>Customer Identifier</b>: B-124587</p>
<p><b>Referral Details</b></p> <p>Referral ID: 17167 Logged By: [Name]</p> <p>Referral Reason: At work with health issue Employee Budget: CC2375</p>	

Records / Performance & Attendance Management Referrals

**Mr testing testing - 3223** Follow

Draft
Pending Approval
Pending Consent
In progress

<p><b>Employee Details</b></p> <p>Name: Mr testing testing Gender: Male Date of birth: 29 March 1973 Email: testing12@yopmail.com Primary Telephone: 3213213321</p>	<p><b>Customer Name</b>: DEMO MAIN <b>Job Title</b>: dasdsadsa <b>Customer Identifier</b>: ci <b>Secondary Telephone No</b>: N/A</p>
<p><b>Referral Details</b></p> <p>Referral ID: 3223 Logged By: Mrs pshealth admin Service Name: OH Advice Main Logged Date: 05/04/2017 15:18 First Day of: 20/02/2017</p>	

Manage Documents

Add

+ Add New Document

**Upload New Documents**

**Document**

Choose file No file chosen

**Document Type**

Select

- Select
- Consent (to refer to OH, request FME)
- Further Medical Evidence
- IHR certificate
- Job description
- Other Document
- Personnel Letter
- Risk assessment

Add

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**If the Employee name is known but the Referral ID and Referral Type is not known:**

13. Log in using your **Username** and **Password**
14. Select **Records**
15. Select **Employees**
16. Using the search facility available, type in the **Employee Name** and press **Enter**, the Employee details will be displayed
17. Select **Employee Name** highlighted in blue -N.B. this will take you to the **Employee Summary Screen**
18. From the menu to the left of the screen select **Referrals & Interventions**
19. The following screen will show a list of all referrals that have been registered for the **Employee**
20. Select the appropriate **Referral ID**
21. Select **Documents** from the menu to the left of the screen
22. Select **Manage Documents**
23. Select **Add**, then **Add New Document**
24. Select **Choose File**, Select **Document** to upload, then select **Open**  
- N.B. Document needs to be saved as you would like it to be called in the system
25. Select **Document Type** from the drop down menu

The screenshot shows the following steps in the system interface:

- Records** menu
- Employees** Record for Employees
- Search Employees results for **Mr Training Keelan** (highlighted in blue)
- Employee Summary Screen** for Mr Training Keelan, showing basic details and work schedule.
- Referrals & Interventions** menu
- Employee Referrals** table:

Referral ID	Service Line	Service	Status
11490	Workplace Assessments	DSE	Closed - all interventions complete
11547	Pre-Placement	Pre-Placement General Main	Closed - all interventions complete
11577	Immunisation	Imms Hep A+B	Closed - all interventions complete
11638	Specialist Services	Physiotherapy Main	Closed - all interventions complete
11646	Specialist Services	Counselling Service Main	Closed - all interventions complete

- Documents** menu
- Manage Documents**
- Add** button
- Add New Document** button
- Upload New Documents** form with **Document** type selected and **Choose file** button.
- Document Type** dropdown menu with **Audiometry records** selected.

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26. Select **Add**, then **Yes**

27. Select **Finish**

28. Document now stored under that Referral

A screenshot of a web interface. On the left, a dropdown menu titled 'File Type' is open, showing three options: 'Select' (highlighted in blue), 'Health', and 'Welfare'. To the right of the dropdown is a green button labeled 'Add'. Below the dropdown and 'Add' button is another green button labeled 'Finish'.