

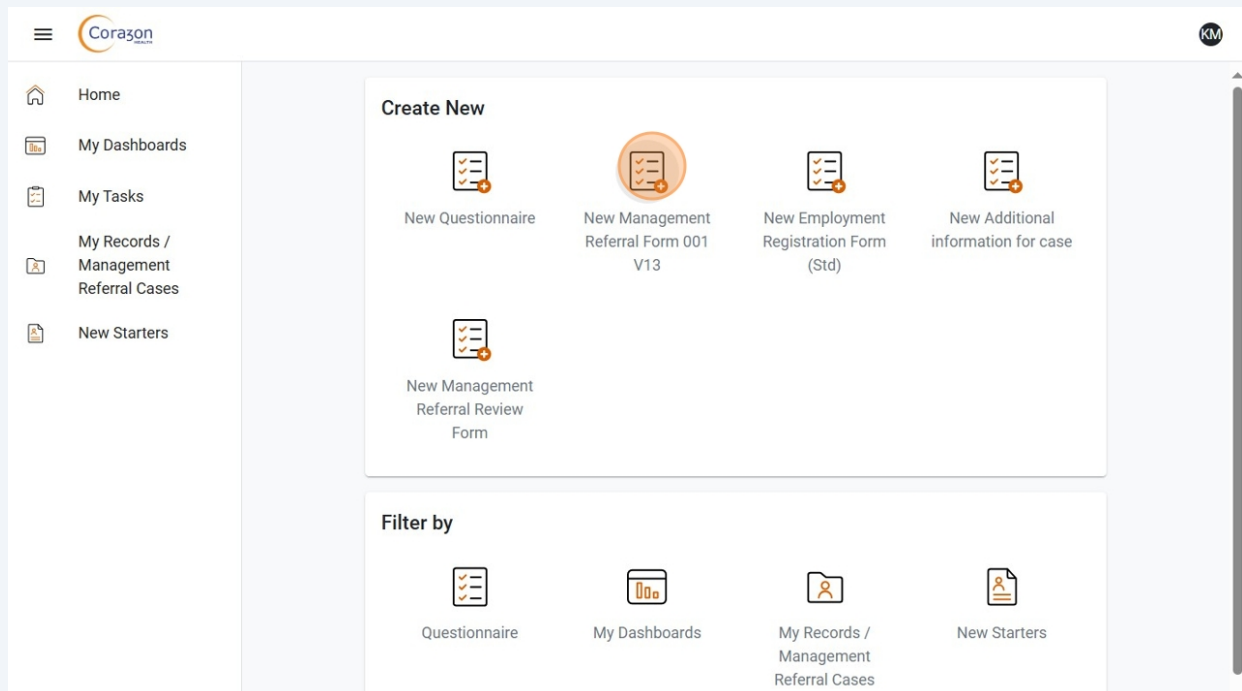
How to complete a Management Referral Form on Cority V2

- 1 Navigate to the Cority website and login.

Link: <https://corazonhealth.my.cority.com/#/login>

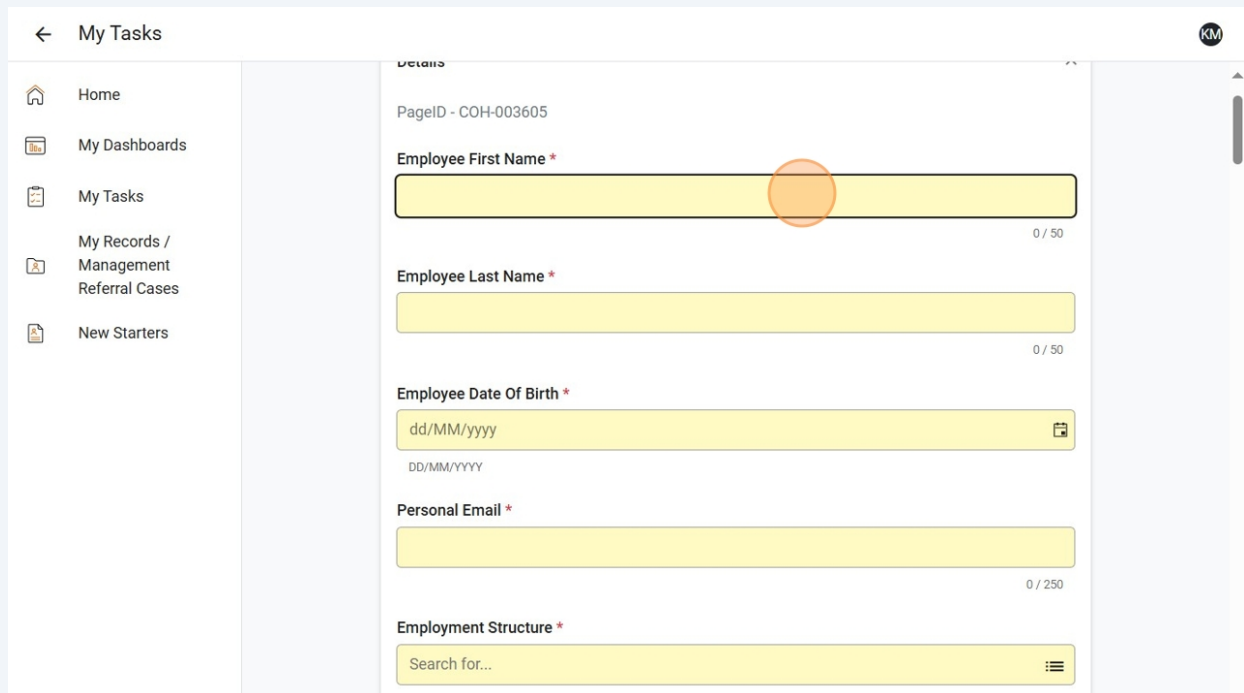
- 2 Please click 'New Management Referral Form 001 V13'.

Please ignore the version number (E.g. V13).



3

Please enter the Employee's First Name and Last Name.



← My Tasks KM

Home
My Dashboards
My Tasks
My Records / Management Referral Cases
New Starters

Details

PageID - COH-003605

Employee First Name * 0 / 50

Employee Last Name * 0 / 50

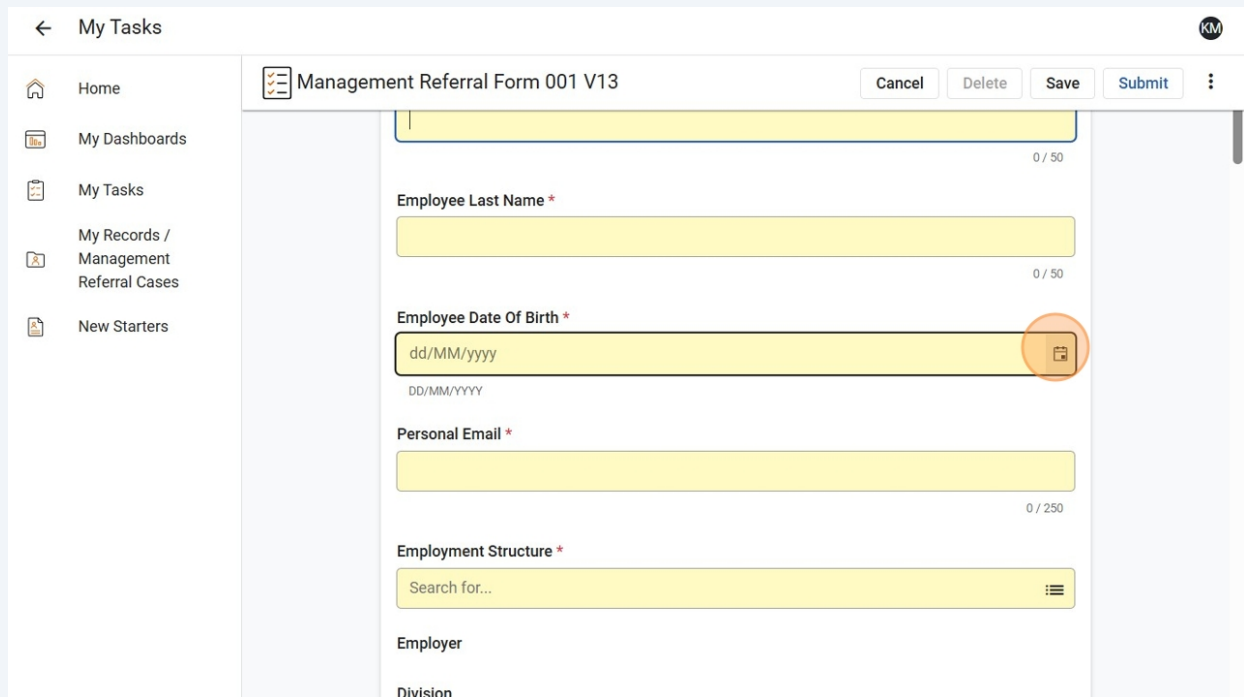
Employee Date Of Birth * dd/MM/yyyy DD/MM/YYYY

Personal Email * 0 / 250

Employment Structure * Search for...

4

Please enter the Employee's Date of Birth. This can be manually entered or added using the calendar by selecting the calendar icon. Date of Birth is mandatory as we require it as an identifier.



← My Tasks KM

Home
My Dashboards
My Tasks
My Records / Management Referral Cases
New Starters

Management Referral Form 001 V13 Cancel Delete Save Submit

Employee Last Name * 0 / 50

Employee Date Of Birth * dd/MM/yyyy DD/MM/YYYY

Personal Email * 0 / 250

Employment Structure * Search for...

Employer

Division

5 Please enter the Employee's Personal Email Address.

The screenshot shows the 'Management Referral Form 001 V13' in a web application. The left sidebar contains navigation links: Home, My Dashboards, My Tasks, My Records / Management Referral Cases, and New Starters. The main content area has a header with 'My Tasks' and a 'KM' logo. Below the header, there are buttons for 'Cancel', 'Delete', 'Save', and 'Submit'. The form fields include: 'Employee Date Of Birth *' with a date picker showing 'day/month/year' and 'DD/MM/YYYY'; 'Personal Email *' with a text input field highlighted by an orange circle and a character count of '0 / 250'; 'Employment Structure *' with a search bar and a character count of '0 / 50'; and a list of fields: 'Employer', 'Division', 'Site', and 'Department'.

6 Please click on the Employment Structure button. This will display your organisational tree.

The screenshot shows the 'Management Referral Form 001 V13' in a web application. The left sidebar contains navigation links: Home, My Dashboards, My Tasks, My Records / Management Referral Cases, and New Starters. The main content area has a header with 'My Tasks' and a 'KM' logo. Below the header, there are buttons for 'Cancel', 'Delete', 'Save', and 'Submit'. The form fields include: 'Personal Email *' with a text input field and a character count of '0 / 250'; 'Employment Structure *' with a search bar and a character count of '0 / 50', highlighted by an orange circle; and a list of fields: 'Employer', 'Division', 'Site', 'Department', and 'Manager'. The 'Manager' field shows the text 'Marlow, Katie (E83181)'. At the bottom, there is a section titled 'Referral Information (Additional Details)' with a 'Hide Related Question(s) ^' button.

7 You will need to pick from the bottom of the tree on the 'Department' layer.

Please note, depending on your level of access you may have several divisions to pick from. Please ensure that you are selecting from the relevant Division/Site/Department.

The screenshot shows a web application interface for the 'Management Referral Form 001 V13'. A modal titled 'Employment Structure' is open, displaying a hierarchical tree of departments. The tree starts with '0. Employment Structure (Full Hierarchy) (GLRoot)', which is expanded to show 'Corazon Health (EMP-6948)'. This is further expanded to show 'Corazon Health (DIR-7492)', which is expanded to show 'Corazon Health - Head Office (SITE-8247)'. The final item, 'Corazon Health (DEP-10510)', is highlighted with an orange circle. The background shows the form's sidebar with options like 'Home', 'My Dashboards', 'My Tasks', 'My Records / Management Referral Cases', and 'New Starters'. The form fields visible include 'Personal Email *', 'Referral Information (Additional Details)', and 'Employee Job Title *'.

8 Please manually enter the Job Title.

The screenshot shows the 'Management Referral Form 001 V13' in the 'My Tasks' section. The form has a sidebar with navigation options: 'Home', 'My Dashboards', 'My Tasks', 'My Records / Management Referral Cases', and 'New Starters'. The form title is 'Management Referral Form 001 V13', and it includes buttons for 'Cancel', 'Delete', 'Save', and 'Submit'. A 'Hide Related Question(s)' link is also present. The 'Employee Job Title *' field is highlighted with an orange circle. Below this field is a 'Date Started in Current Post' field with a date picker (dd/MM/yyyy). The 'Referred By Group *' field has a search bar (Search for...). The 'Manager Name' field is also present. At the bottom, there is a text area for 'Please state a Purchase Order Number or unique order reference that should be quoted when invoicing this case: *'.

9

Please click 'Search' on the Referred By Group and select who is making the referral (E.g. HR).

The screenshot shows the 'Management Referral Form 001 V13' interface. On the left is a sidebar with navigation links: Home, My Dashboards, My Tasks, My Records / Management Referral Cases, and New Starters. The main form area contains several fields: 'Employee Job Title *' (text input), 'Date Started in Current Post' (date picker), 'Referred By Group *' (search input with a magnifying glass icon highlighted by an orange circle), 'Manager Name' (text input), and a large text area for 'Please state a Purchase Order Number or unique order reference that should be quoted when invoicing this case:'. The form has 'Cancel', 'Delete', 'Save', and 'Submit' buttons at the top right.

10

Please enter the Purchase Order Number or unique order reference that should be quoted when invoicing this case if applicable.

If not required, please just put a full stop in the box (This box is a mandatory field).

This screenshot shows the same 'Management Referral Form 001 V13' from a different perspective. The 'Manager Name' field is now visible above the 'Purchase Order Number' text area. The 'Purchase Order Number' text area is highlighted with an orange circle. Below the form, there is a section for the 'Company Logo' and the title 'Occupational Health - Management Referral'. This section contains contact information for the head office (01223 834404) and a note that assessments will not be scheduled until a PO number is provided. The sidebar and top navigation buttons are also visible.

11 Information provided at the top of the referral form

Home

My Dashboards

My Tasks

My Records / Management Referral Cases

New Starters

Management Referral Form 001 v1.0

CancelDeleteSaveSubmit

Occupational Health - Management Referral

Should you wish to discuss an individual case prior to making a referral please call our head office on 01223 834404.

If your company uses purchase order (PO) numbers an assessment will not be scheduled until the PO number has been provided.

Please complete all sections of the referral form and submit together with any relevant supporting information such as a full job description, sickness absence data and work risk assessments using the attachments section on the following screen. Failure to complete all sections of the referral form may lead to a delay in scheduling a clinical assessment and provision of advice to line management.

Standard Management Referral is deemed as a referral that addresses:

- Short term multiple absence
- Single health issue

Complex Management Referral is deemed as a referral that addresses:

- Mental health issues/ work related stress
 - An interpreter is required
- An employee has more than one health issue
 - Neurodiversity disorders
- Multiple attachments from referring manager
- Disciplinary issues / performance issues

Please note that if during the assessment additional health issues are identified a further appointment will be requested.

12 Please enter the Employee's 'working hours and pattern' in the free text box.

Then select if it is the primary role for your employee.

Please detail any 'potential job demands and hazards/risks of the role' in the free text box.

13 Please select how the assessment should be booked with the employee and enter their phone number.

14 Please advise if the employee is currently at work or absent from work.

Then click the 'search' icon to select the main reason for referral.

The screenshot displays the 'Management Referral Form (001 v1.0)' interface. On the left is a sidebar with navigation links: Home, My Dashboards, My Tasks, My Records / Management Referral Cases, and New Starters. The main content area contains several form sections. The first section, 'Is the employee currently: *', has three radio button options: 'Not yet commenced work', 'At work', and 'Absent from work'. Below this is a 'Referral details:' section. The next section, 'Please select the main reason for referral *', features a search bar with the placeholder text 'Search for...' and a magnifying glass icon, which is highlighted with an orange circle. This is followed by a text area for 'What is the reason for this referral? *' with a character count of '0 / 4000'. The final section, 'Has the business put in place actions/support regarding the reason for the referral? *', includes a 'Yes' radio button option. At the top right of the form, there are buttons for 'Cancel', 'Delete', 'Save', and 'Submit'.

15

Please then provide the details for the reason for referral in the free text box under 'What is the reason for this referral?'.

Please advise if you have put in place actions/support regarding the reason for referral and if the actions have been effective.

Please specify any additional information you feel is relevant to the referral.

← My Tasks KM

Management Referral Form 001 V13 Cancel Delete Save Submit

What is the reason for this referral? *

0 / 4000

Has the business put in place actions/support regarding the reason for the referral? *

☐ Yes

☐ No

Please specify any additional information you feel is relevant to the referral:

0 / 4000

16

Please select if you would like a triage call with the nurse before the assessment with the Employee.

If so, please provide the name and phone number of the person who will be taking the triage call.

The screenshot shows a web application interface for a 'Management Referral Form'. On the left is a sidebar with navigation links: Home, My Dashboards, My Tasks, My Records / Management Referral Cases, and New Starters. The main content area is titled 'Management Referral Form 001 v1.0' and includes buttons for Cancel, Delete, Save, and Submit. A text box at the top states: 'If there are any business requirements which mean certain adjustments i.e. hybrid working, reduced duties cannot easily be accommodated we strongly recommend a triage call is completed so that our clinical team can have a further discussion with you prior to the assessment with the individual.' Below this is a question: 'Would you like to discuss the referral with an occupational health clinician prior to the assessment with the employee?'. The 'Yes' option is selected with a checked checkbox. Below the question is a text input field with a question mark icon. Another text prompt asks: 'Please provide us with the name and contact details of the person we should arrange this call with.' Below this is a large yellow text area with a circular orange icon and a character count '0 / 4000'. At the bottom, under the heading 'Assessment criteria: Please indicate which of the following questions you would like Occupational Health to answer:', there is a list of checkboxes. The first checkbox, 'What is a likely timescale for the employee to be fit to return to work?', is selected.

17

Please select any questions you would like answering within the report.

The screenshot shows the same 'Management Referral Form' interface as above. In this step, the 'Assessment criteria' section is expanded, showing a list of questions with checkboxes. The following questions are selected: 'What is a likely timescale for the employee to be fit to return to work?', 'Is the illness / condition likely to last for 12 months or more?', and 'Are workplace adjustments or restrictions required? If yes, please advise whether these are permanent or temporary and, if temporary, for how long?'. The other questions, 'Has work been a contributing factor to their ill health?', 'Is the employee likely to provide a reliable service/attendance in the future?', 'Will the illness/condition affect their normal day to day activities (to include shopping, exercise, sport, gardening, transport)?', 'Is the employee fit to continue in their current position?', and 'Is ill-health capability relevant?', are not selected.

18 If you would like any additional questions, please enter them at this point.

Please note that there is a limit of 2 additional questions.

The screenshot shows the 'Management Referral Form (001 v1.0)' with a sidebar on the left containing links to Home, My Dashboards, My Tasks, My Records / Management Referral Cases, and New Starters. The main form area has a title bar with 'Cancel', 'Delete', 'Save', and 'Submit' buttons. Below the title bar, there are several checkboxes with labels: 'Is the illness / condition likely to last for 12 months or more?' (checked), 'Will the illness/condition affect their normal day to day activities (to include shopping, exercise, sport, gardening, transport)?' (unchecked), 'Are workplace adjustments or restrictions required? If yes, please advise whether these are permanent or temporary and, if temporary, for how long?' (checked), 'Is the employee fit to continue in their current position?' (unchecked), and 'Is ill-health capability relevant?' (unchecked). Below these is a text area labeled 'Other: Please do not submit more than two additional questions for this referral.' with a character count '0 / 4000'. At the bottom, there is a section for 'ONLINE APPLICATION DECLARATION (if applicable)' with a text area for the user to provide consent.

19 Please click 'I AGREE' to provide consent.

The screenshot shows the 'Management Referral Form (001 v1.0)' with the same sidebar as in the previous image. The main form area has a title bar with 'Cancel', 'Delete', 'Save', and 'Submit' buttons. Below the title bar, there is a large text area for the 'ONLINE APPLICATION DECLARATION (if applicable)'. The text in this area reads: 'I have informed the individual that they are being referred to occupational health and they have consented to this process. I have fully explained the reason for the referral and supplied them with a copy of this form*. I have also made them aware that following this process a report will be supplied to the business. I have made the individual aware that if a video or telephone appointment is arranged, they will need to make arrangements to take the call in a private area and be available for around 30-45 minutes for the full consultation. I can confirm that the individual mentioned in this management referral is contracted/trained in the United Kingdom and I understand that the advice given in the report is based upon UK legislation. Please sign the declaration by typing "I AGREE" below *The form can be downloaded from the Management Referral Plus portal. Please note that the referral form can be requested by the individual at any point. GDPR STATEMENT FOR REFERRED INDIVIDUAL: Corazon Health Ltd is committed to protecting your rights and acknowledges that any personal data of yours that we handle will be controlled and processed in accordance with the current Data Protection law and the General Data Protection Regulations (GDPR) 2018. To access our full Privacy Notice please go to: <http://www.corazonhealth.co.uk/terms> Please note that this form will be provided if a request against a legal claim is made.' Below this text is a yellow bar with a dropdown arrow. Below the yellow bar is an 'Attachments' section with a file upload icon. At the bottom, there is a 'Read Only Section' and a 'Show Related Question(s)' button.

20

Please upload any attachments that are relevant to the referral (E.g. job description, sickness absence records etc).

The screenshot shows the 'Management Referral Form 001 V13' interface. On the left is a sidebar with navigation links: Home, My Dashboards, My Tasks, My Records / Management Referral Cases, and New Starters. The main content area displays the form title and buttons: Cancel, Delete, Save, and Submit. A modal window titled 'Add Attachments' is open in the center, featuring a 'Select files...' input field, a paperclip icon, and 'Cancel' and 'Attach' buttons. The background form text includes an 'ONLINE APPLICATION DECLARATION' section with a paragraph of text and a yellow 'I AGREE' dropdown menu. Below this is an 'Attachments' section with a paperclip icon and a 'Read Only Section' with a 'Show Related Question(s)' dropdown.

21

Click 'Save' to save the referral.

The screenshot shows the 'Management Referral Form 001 V13' interface. The 'Save' button is highlighted with an orange circle. The form content includes a paragraph of text, a yellow 'I AGREE' dropdown menu, an 'Attachments' section with a paperclip icon, and a 'Read Only Section' with a 'Show Related Question(s)' dropdown. The footer of the form displays the text 'DK_MIGCOH_2496_CHL_TargetProd'.

22

If you would like to draft the referral and come back to complete it at a later point, you can locate the saved referral in 'My Tasks'.

When the referral is complete, click 'Submit' to submit the referral. You will receive a generic email notification to confirm the referral has been received.

The case will then appear on your dashboard once it has been matched into the system by the Administration Team who will then be in touch.

You will receive email notifications to alert you when you have received a message or a report has become available.

The screenshot displays the 'My Tasks' section of a web application. On the left is a sidebar with navigation links: Home, My Dashboards, My Tasks, My Records / Management Referral Cases, and New Starters. The main content area is titled 'Management Referral Form 001 V13' and includes a 'PageID - COH-003605'. At the top right of the form are buttons for 'Cancel', 'Delete', 'Save', and 'Submit'. The 'Submit' button is highlighted with an orange circle. Below the buttons is a 'Details' section with four input fields: 'Employee First Name *' (0 / 50), 'Employee Last Name *' (0 / 50), 'Employee Date Of Birth *' (dd/MM/yyyy, 0 / 50), and 'Personal Email *' (0 / 250). Each field is represented by a yellow rectangular input box.