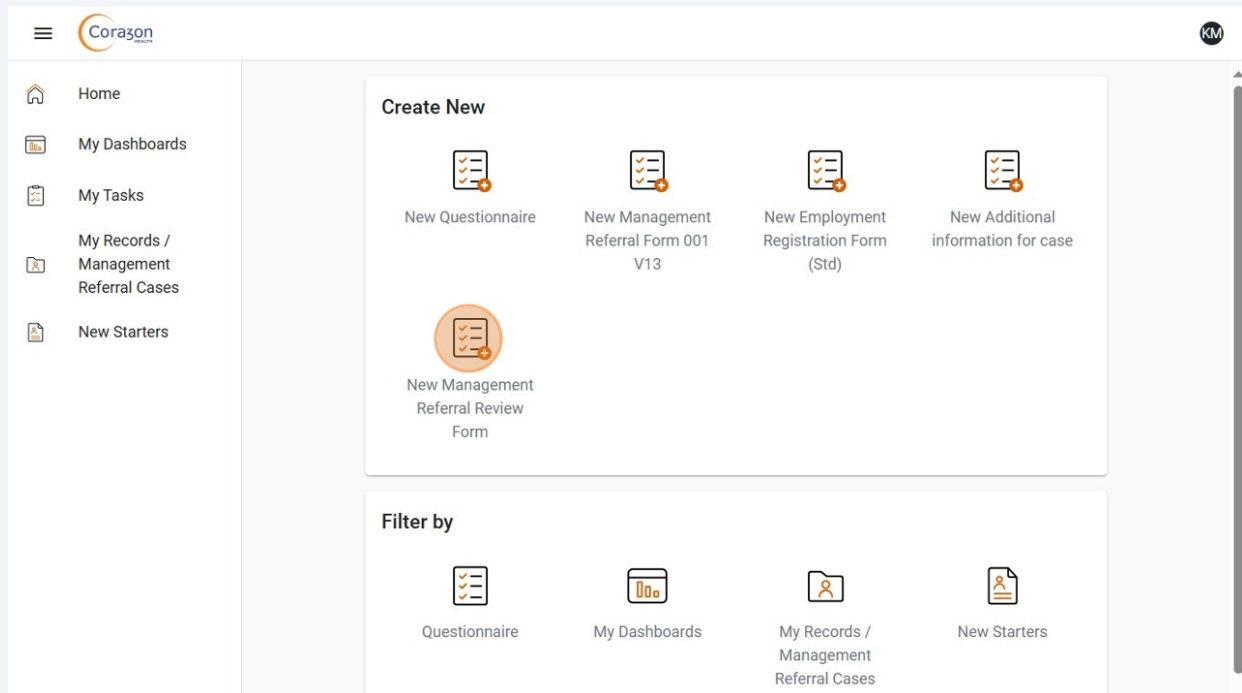


How to complete a Management Referral Review Form on Cority V2

- 1 Navigate to the Cority website and login.

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

- 2 Please click 'New Management Referral Review Form'.



3

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

Please enter the Employee's Date of Birth. This can be manually entered or added using the calendar by selecting the calendar icon.

Please enter the Employee's Personal Email Address.

The screenshot shows the 'My Tasks' page with a sidebar on the left containing links to Home, My Dashboards, My Tasks, My Records / Management Referral Cases, and New Starters. The main content area displays the 'Management Referral Review Form' for PageID - COH-003605. The form includes the following fields:

- Employee First Name ***: A text input field with a character count of 0 / 50. An orange circle highlights the end of the field.
- Employee Last Name ***: A text input field with a character count of 0 / 50.
- Employee Date Of Birth ***: A date input field with a placeholder 'dd/MM/yyyy' and a calendar icon on the right. Below the field is the text 'DD/MM/YYYY'.
- Personal Email ***: A text input field with a character count of 0 / 250.
- Employment Structure ***: A dropdown menu with a placeholder 'Search for...' and a list icon on the right.

Below the Employment Structure field, the text 'Employer' is partially visible.

4

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

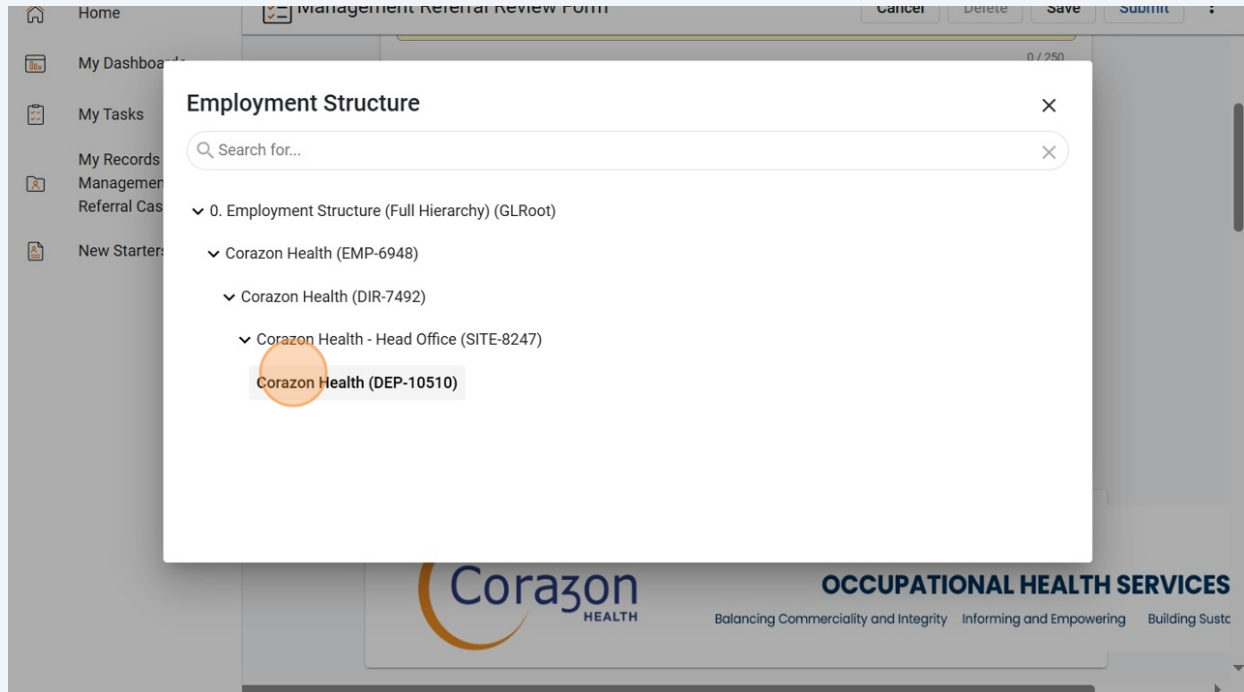
The screenshot shows the 'My Tasks' page with the 'Management Referral Review Form' open. The form has a title bar with a list icon, the title 'Management Referral Review Form', and buttons for Cancel, Delete, Save, Submit, and a menu icon. The form includes the following fields:

- Employment Structure ***: A dropdown menu with a placeholder 'Search for...' and a list icon on the right. An orange circle highlights the list icon.
- Employer**: A text input field with a character count of 0 / 250.
- Division**: A text input field.
- Site**: A text input field.
- Department**: A text input field.
- Manager**: A text input field with the value 'Marlow, Katie (E83181)'.

At the bottom of the page, the Corazon logo and the text 'OCCUPATIONAL HEALTH SERVICES' are visible.

5 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.



6 Please enter the 'Date of review request' and the 'Date of the last assessment'.

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).

The screenshot shows the 'Management Referral Review Form' 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 has a title bar with 'Management Referral Review Form', 'Cancel', 'Delete', 'Save', 'Submit', and a menu icon. Below the title bar is a warning message: 'This form should only be used for current "Active" cases to request a review. If the individual you are seeking a review for is not a current open case, please submit a new referral form'. The form contains three input fields: 1. 'Date of review request: *' with a yellow input box containing 'dd/MM/yyyy' and a calendar icon. 2. 'Date of last assessment: *' with a yellow input box containing 'dd/MM/yyyy' and a calendar icon. 3. 'Please state a Purchase Order Number or unique order reference that should be quoted when invoicing this case:' with a large empty text box. A character count '0 / 4000' is visible at the bottom right of the text box.

7 Please answer the 4 questions.

The screenshot shows the 'Management Referral Review Form' interface, similar to the previous one. The sidebar and title bar are the same. The main content area contains four text input fields, each with a yellow background and a character count of '0 / 4000' at the bottom right: 1. 'What actions have been taken since their last OH assessment? *' 2. 'How is the employee currently coping with their role? *' 3. 'Do you have any further concerns regarding capabilities for the role? *' 4. A fourth question field is partially visible at the bottom.

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

Please note that there is a limit of 4 additional questions.

The screenshot shows the 'Management Referral Review Form' 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 has a header with a back arrow, 'My Tasks', and a 'KM' logo. Below the header is a form titled 'Management Referral Review Form' with buttons for 'Cancel', 'Delete', 'Save', 'Submit', and a menu icon. The form contains three sections: 1. A text area with the prompt 'Do you have any further concerns regarding capabilities for the role? *' and a character count '0 / 4000'. 2. A text area with the prompt 'Further questions you would like answered in this review (Note: Please request a maximum of 4 questions).' and a character count '0 / 4000'. 3. An 'Attachments' section with a paperclip icon. At the bottom is a declaration section with the text 'Declaration I have informed the employee of my concerns and additional questions. *'.

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

The screenshot shows the 'Management Referral Review Form' interface, similar to the previous one. The sidebar and header are the same. The form title 'Management Referral Review Form' and its buttons are also present. The form content is different: 1. A text area with a character count '0 / 4000' is at the top. 2. The 'Attachments' section is highlighted with an orange circle around the paperclip icon. 3. Below the attachments is a declaration section with the text 'Declaration I have informed the employee of my concerns and additional questions. *' and a 'Clear' button. At the very bottom, a note states 'Please note that the additional information will be provided if there is a subject access'.

10 Please sign the declaration.

The screenshot shows a web application interface for a 'Management Referral Review 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 has a top bar with 'Cancel', 'Delete', 'Save', and 'Submit' buttons. Below this is a large text input field with a '0 / 4000' character count. Underneath is an 'Attachments' section with a paperclip icon. The main section is titled 'Declaration I have informed the employee of my concerns and additional questions. *'. It contains a large rectangular box with an orange circle in the top-left corner, indicating where to sign. Below the box is a 'Clear' button. At the bottom of the form, there are two lines of text: 'Please note that the additional information will be provided if there is a subject access' and 'Corazon Health Ltd is committed to protecting your rights and acknowledges that any personal data of'.

11 Click 'Save' to save the form.

This screenshot shows the same 'Management Referral Review Form' as in the previous step. The 'Save' button in the top right corner is highlighted with an orange circle. The signature box now contains a black horizontal line, representing a signature. The rest of the interface, including the sidebar and other form elements, remains the same.

12 Click 'Submit' to submit the form.

A member of the Administration Team will be in touch soon.

The screenshot displays a web application interface. On the left is a sidebar menu with the following items: 'Home', 'My Dashboards', 'My Tasks', 'My Records / Management Referral Cases', and 'New Starters'. The main content area is titled 'Management Referral' and contains a form titled 'Details'. The form includes the following fields: 'PageID - COH-003605', 'Employee First Name *' (text input, 0 / 50 characters), 'Employee Last Name *' (text input, 0 / 50 characters), 'Employee Date Of Birth *' (date input, dd/MM/yyyy, 0 / 50 characters), and 'Personal Email *' (text input, 0 / 250 characters). A success message 'Success Record Saved' is displayed at the top of the form. At the top right of the form, there are buttons for 'Cancel', 'Delete', 'Save', and 'Submit'. The 'Submit' button is highlighted with an orange circle. A user profile icon 'KM' is visible in the top right corner.