Yodha – Occupational Health Portal

User Guide

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Overview

Yodha Occupational Health is the designated portal for your Occupational Health requirements. This portal can be accessed 24hours per day 7 days per week and allows you to manage your management referral requirements and track all of your health surveillance results in one easy to use system.

Our friendly client account managers are still at hand should you wish to discuss a case in further detail.

If at any stage you require further assistance please contact your account manager on 08450 50 40 60.

Initial user requirements

Prior to accessing this portal, the key contact at your organisation will complete a user specification document that will outline the hierarchies within your business and set specific access levels based on an individual's requirements to ensure that relevant parties see only the information applicable to them.
The Yodha Portal replaces the need to email any management referrals documents prior to referring into Occupational Health or requests for management information relating to health surveillance.

Accessing the Portal

Your log in details will have been sent to you via email, this will contain your password and the link to the Yodha Occupational Health Portal. Alternatively, you can access it using this link:
https://oh.employersafe.co.uk/

If you need to reset your password, then there is a link at the bottom of the log in page.

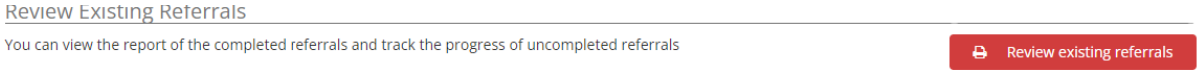
Portal Homepage

The following options are available through the portal:

(Access to these areas will be dependent on the security settings that have been allocated to your user account.)



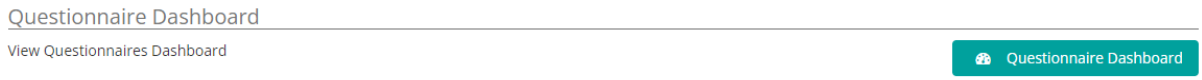
This button will enable you to make a management referral for an employee



This button will enable you to view any ongoing referrals or the reports from previous assessments.



This button will enable you to see the outcomes and results from recent health surveillance visits. You will also be able to review trends across multiple locations if necessary.

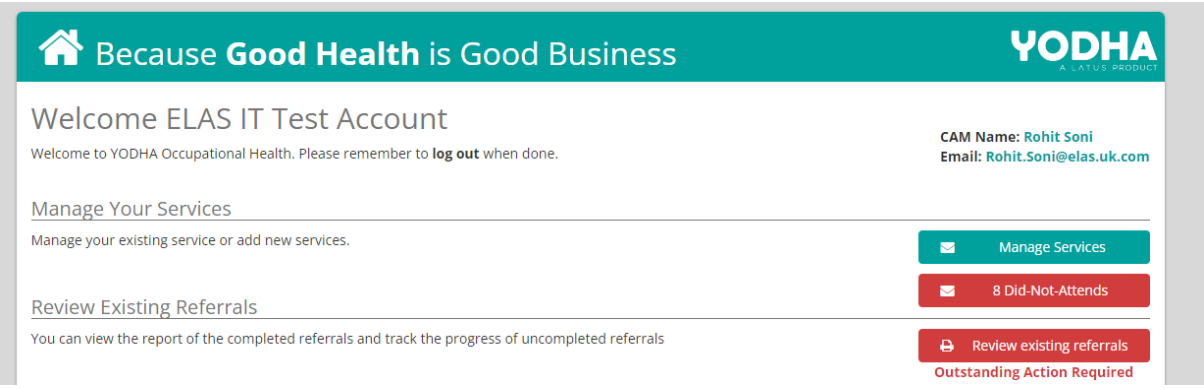


This button will enable you to assign questionnaires to your employees and track the progress of each questionnaire.

Management Referrals

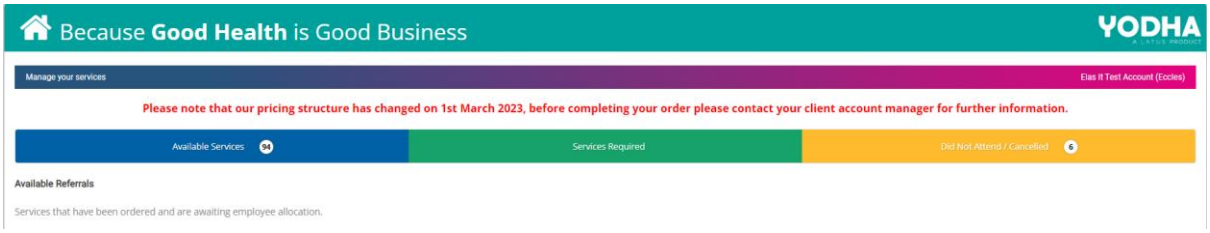
Creating a new Referral

The main welcome screen will remain the same. To create a new referral or service request select the "**Manage Services**" button from the below menu.



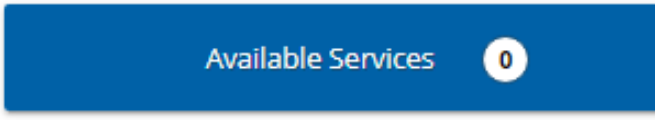
You may be asked to select your location depending on how many sites are assigned to your account. Once the location has been selected, press "Start" to proceed.

Three sections will then be available:-

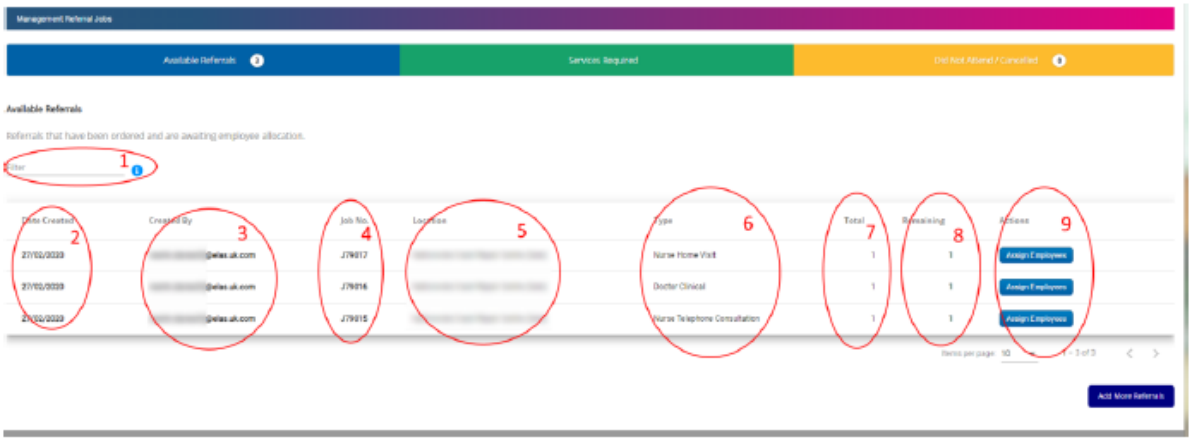


1. **Available Services** – This section will display any previously requested referrals either via our sales team or ordered within our “Services Required” section.
2. **Services Required** – This section will facilitate the requesting of referrals/additional services. Once they have been selected, they will then appear in the ‘Available Referrals’ section.
3. **Did Not Attend/Cancelled** – Any Referral that has not been attended or has been cancelled (with 7 days of the appointment) will be displayed in this section.

Available Referrals



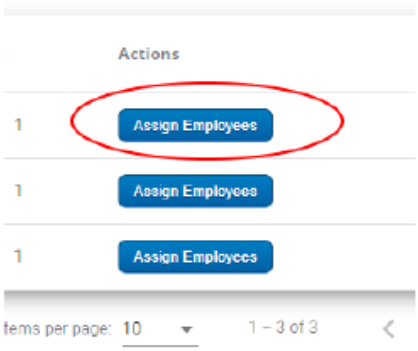
This section displays the available services that can be assigned to employees and submitted for review.

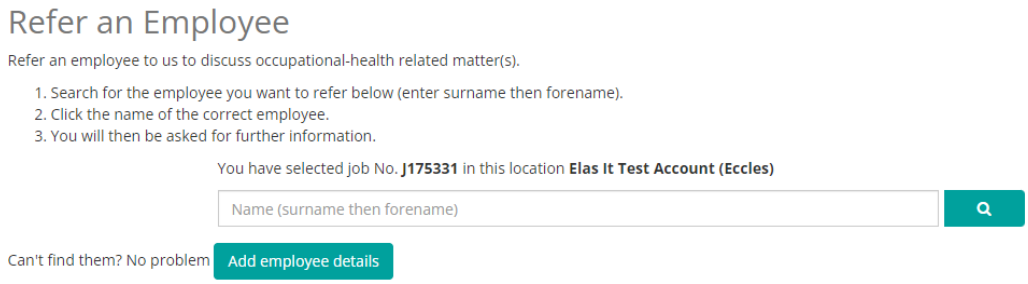


1. The filter can be used to search for key words in any column, e.g. if the word ‘nurse’ is types in, only referrals with that include that word will be displayed.
2. Date created displays the date that the particular referral was requested.
3. Created by displays the email address of the user who requested the referral. If it was requested through the ELAS team, then it will display ‘ELAS OH’.
4. Each visit is assigned its own unique job number. This allows for easy identification if you need to speak to the team.
5. If your account has access to multiple locations, you can see which location the referral has been requested against. You are not able to change locations to a previously requested referral; a new referral will have to be ordered.
6. Type displays a shortened description of the requested referral.
7. Total displays the number of referrals that have been requested for the visit e.g. if two nurse onsite management referrals have been selected in one block this will display 2.
8. Remaining displays the number of employee slots available on the visit. If the above example is used, if one employee has already been assigned, then this will display 1.
9. Actions allows for the assigning of the employee to the referral and then the submission.

Assign Employee

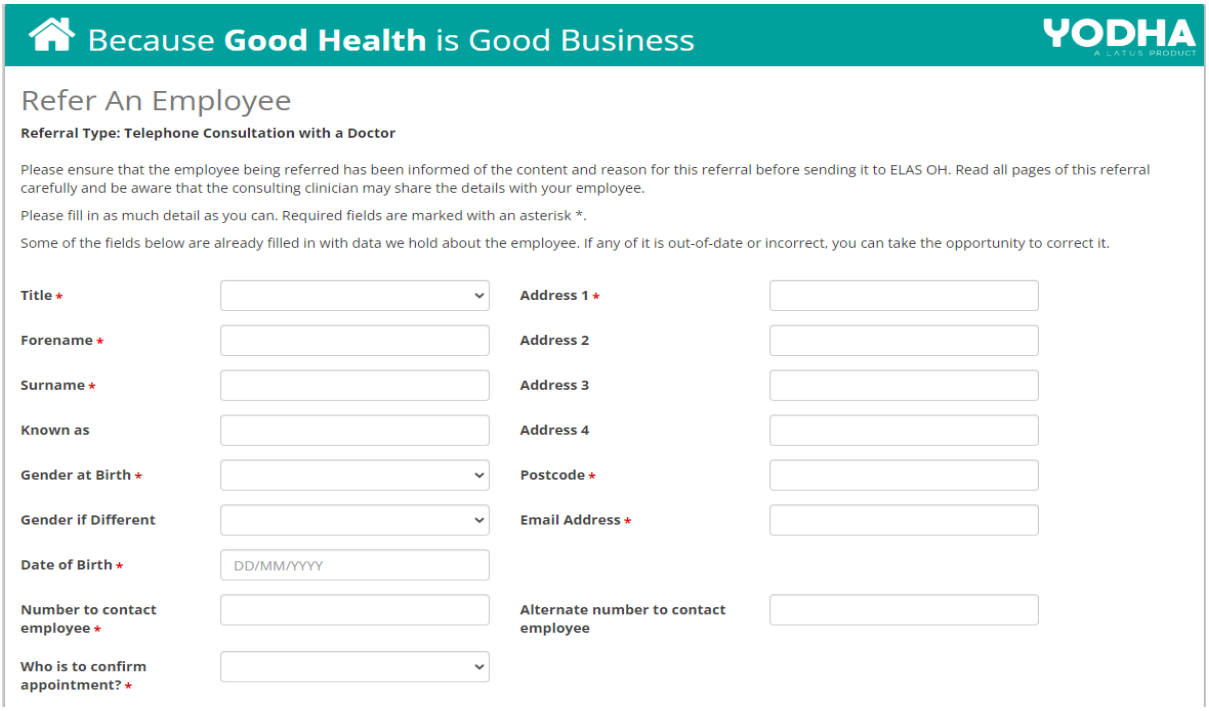
Clicking the 'Assign Employee' button will navigate to where you can select an employee.





You can either search for an employee if the employee exists within the system, or a new employee can be created by clicking "Add employee details".

The next section requires the population of employee and referral reasons.



Dependant on the service requested, an option will be available to indicate who is to confirm the appointment for example, if a phone consultation is requested, arrangements can be made directly with the employee should this be selected. The referring manager will still receive copies of the confirmation emails.

Please be aware, should an onsite referral with a nurse be selected, there is an option for a workstation assessment to be selected. Dependant on the numbers seen on the day, the client account manager may advise you that additional appointment slots are required and could result in additional charges.

Points to note:

Any fields that contain a * are mandatory fields.

There are also other requirements based on specific fields.

Employee Email Address

Employee Email Address: This field should be entered if known. All correspondence with the employee will be done via this email address therefore it's important to enter the correct address. The employee will receive a copy of the appointment notification and subsequent report.

Should this information not be available, our team will ask the employee for their email address in order to enable the report to be released quickly and efficiently.

In the event that the employee does not wish to provide an email address the information will be sent by post.

Employee Contact Details

Number to contact employee: This should be the main contact number to speak to the individual. The system will also accept an alternate number should they also have home/mobile numbers. Contact address same as home address: This box should be ticked if the individual's main point of contact will be their home address. In the event that the individual is currently living at an alternate address or they wish for all the correspondence to be directed to another location, please complete the address details contained in this section.

Job Details

Location: The drop down menu will show those locations which are allocated against your user settings. If there are multiple sites then care needs to be taken to ensure the employee is set against the correct location.

Job Title: This is a mandatory field and all titles are bespoke to your organisation. If additional titles are required, select the 'Add new' option.

Contracted Hours / Work Pattern and Days Worked

These fields provide additional information to the clinician when looking at any possible restrictions to role. Whilst these fields are not mandatory, it is useful to have this information on the referral.

Referring Manager

The referring manager is the individual who will receive email confirmation of the referral submission. They also have the ability to accept appointments on behalf of employees (dependant on referral options), email confirmation of appointments and any notifications once the report is accessible through the system.

Additional Recipients

In the event that more than one individual requires receipt of notification of appointments or the report is accessible through the system then these details can be added at this stage, for example, if

your organisation uses a group email address to notify a number of individuals as to the status of a case, then you should enter this here.

Assessment Required

This section enables you to request a specific type of assessment dependent on clinician or type of appointment such as a Workstation Assessment in addition to a management referral onsite.

Once this has been entered into the portal, our client account managers will review the assessment type, in association with the referral document, to ensure the appropriate clinician and appointment type has been selected.

Background & Referral Instructions

This section is vital to the referral and should be completed as thoroughly as possible with all sufficient information with regards to why the individual is being referred to OH.

If the individual is currently absent from work, then you should detail the date on which their absence commenced.

Please detail the information contained on any relevant fit notes, as well as any other supporting information within the reasons for absence section. You can also upload this at the end of this section.

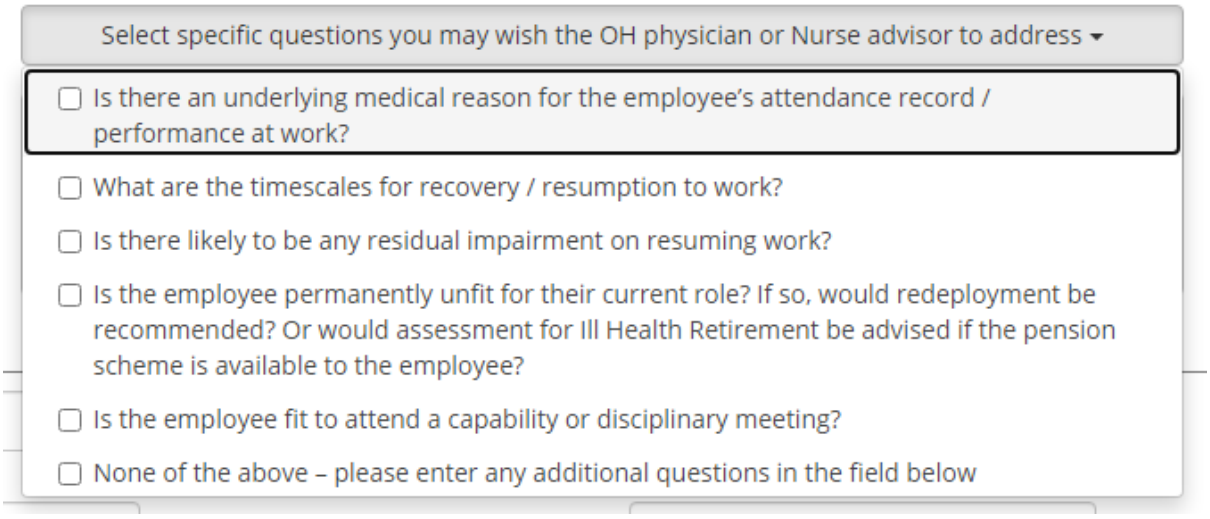
Please be aware that the individual has the right to access information contained within the referral, therefore you should take caution when disclosing sensitive information.

If the individual has previously been referred to Occupational Health, it is possible to enter any previous referral dates so that the clinician is able to review them.

The additional notes or needs section should document any specific requirements needed during the course of the referral e.g. the individual is hard of hearing, a translator is required or the employee will be on annual leave for a period of xx weeks.

Questions you would like our Occupational Health Professional to respond to

The system is pre-populated with the most common referral questions that are contained on our paper referral forms.



Tick the relevant question(s) which you wish the clinician to respond to. You can select multiple questions.

The “additional questions to be answered box” is available should you have any particular relevant questions. This is a free text box and only three additional questions can be asked.

Please be aware that any additional questions should be asked within the remit of a response for Occupational Health.

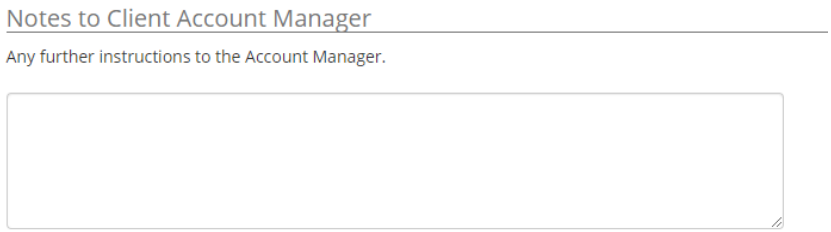
This is a mandatory selection. If you do not wish any of the example questions to be asked then select the “None of the above” option and enter questions in the “Additional questions to be answered” box.

Activities per day/shift

This section contains the most common type of activities undertaken by individuals. Whilst this is not a mandatory field it does aid the clinician to make recommendations of any restrictions that may be applicable.

Notes to Client Account Manager

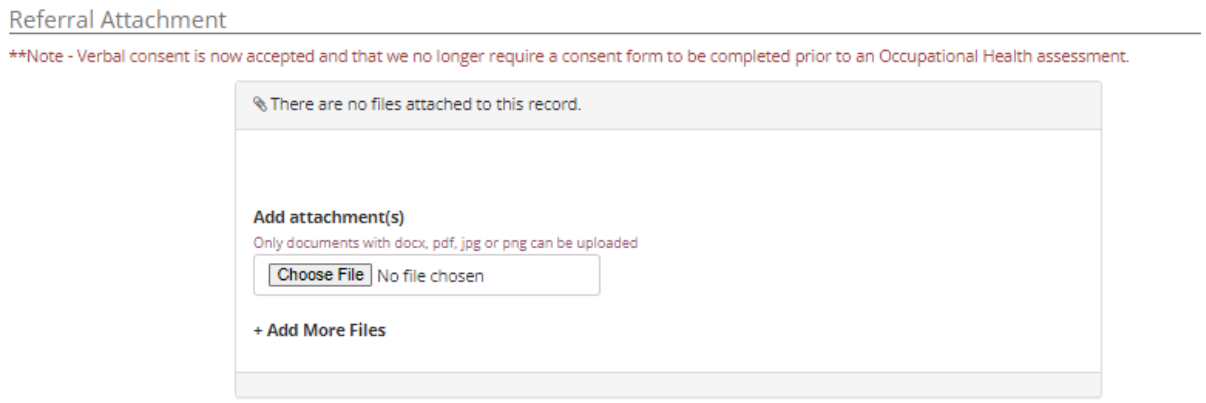
This section should be used for any additional information you would like to make your account manager aware of.



Referral Attachments

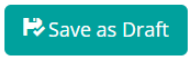
Here you can attach any supporting information such as sick notes, job descriptions etc.

Please note, if the referral you are submitting is a telephone consultation, you will need to attach the consent form that should have been provided to you via your account manager, completed by the employee. If you have not been provided with a copy of our consent form, please contact your account manager prior to submitting a referral.



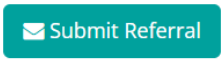
Save Referral as Draft

You can save the referral progress/ information without submitting actual management referral by clicking ‘Save as Draft’ button.



Send Referral

Once all details have been completed, the ‘Submit Referral’ button can be clicked to send the referral to the team to review. They will contact you should further information be required.



Services Required



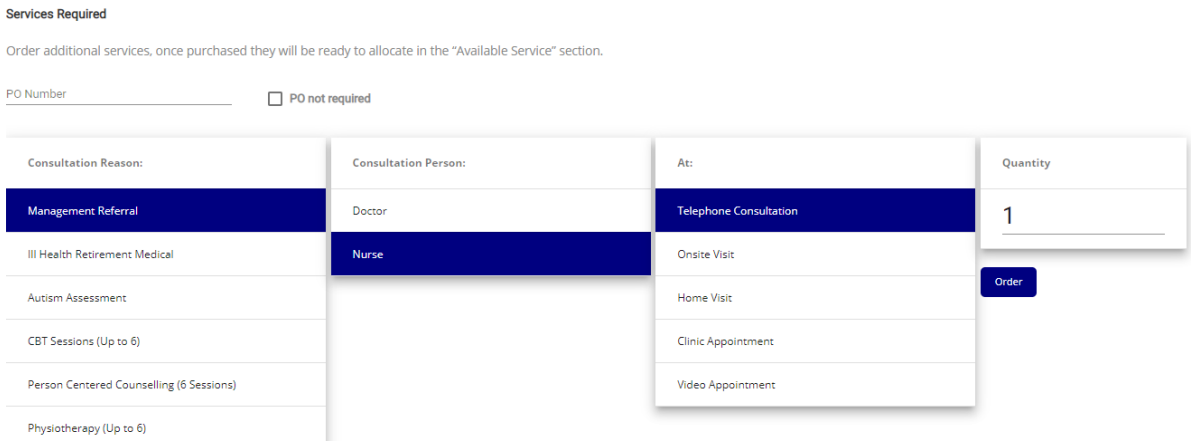
If no existing referral/additional services have been submitted, the list in the “Available Services” section will be empty and they will need to be requested prior to assigning the service to the employee.

Clicking on either the ‘Services Required’ tab or ‘Add More Services” button will navigate you to the area where additional referrals can be selected. You will need to click through the available services within the menu, follow through the options provided and click order to complete the request.

PO number entry

If no PO number is required, then the checkbox can be selected. This will then auto populate the PO field with part of the users email address for accounting purposes.

A referral consultation reason can be selected from the list. As soon as an item is selected, it will populate the next corresponding fields. E.g. if one Management Referral undertaken by a nurse over the telephone, the following would be selected –



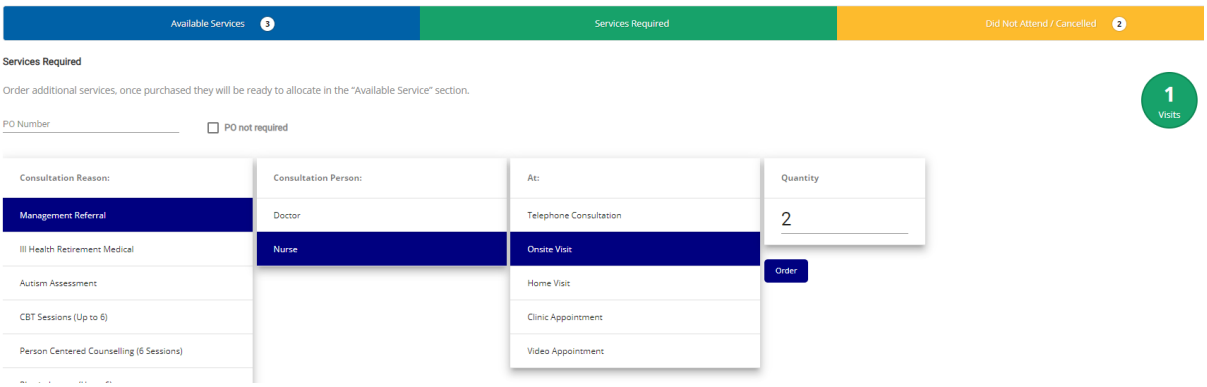
Please note, the requesting of Medical Records is only applicable for Doctor led services. Please be advised that an appointment will not be offered until return of the medical records from the employees GP/Specialist and additional charges apply.

Visits

The system will inform you of how many visits the selected referrals will require 

Scenario 1

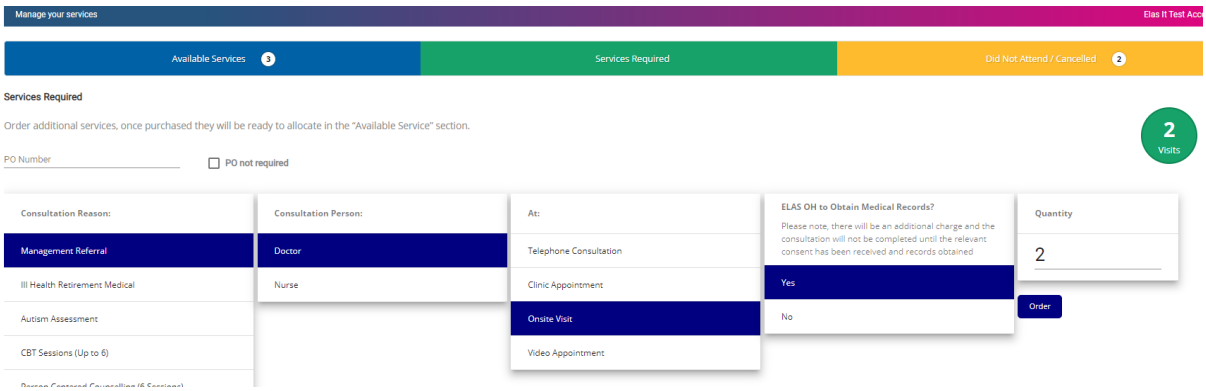
A nurse is selected to undertake two management referrals on your company premise. The portal will then advise you that only one visit is required and this is populated below.



Scenario 2

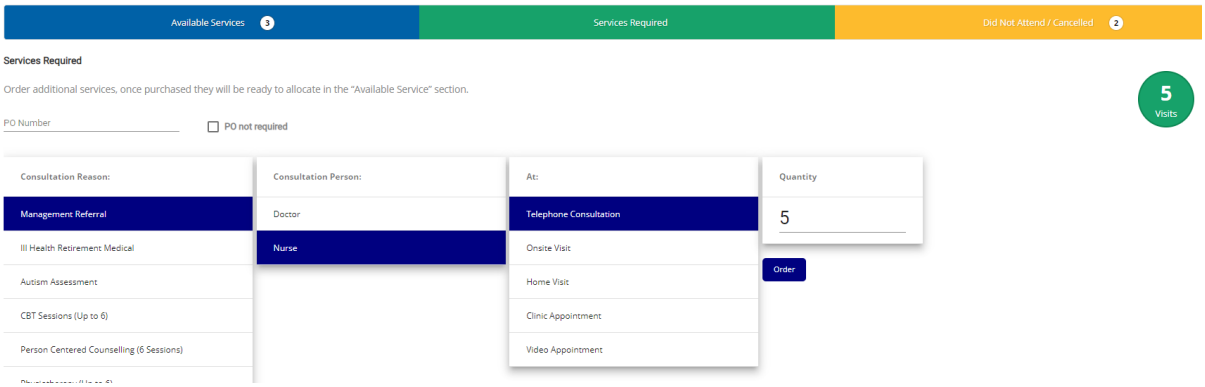
A Doctor is selected to undertake two management referrals on your company promise where ELAS OH are to obtain medical records first, then this will transpire into two visits. This is due to the request procedure for each employees' medical records from their GP's.

Please note, GP medical records requests can take from 1-3 months for the records to be obtained. Splitting the visit will ensure the employees are seen as quickly as possible –



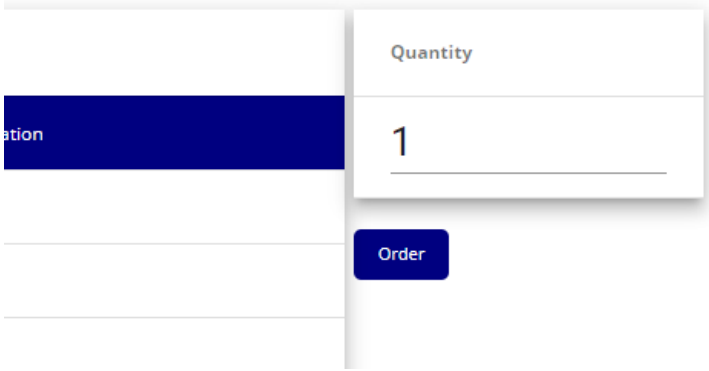
Scenario 3

A nurse is selected to undertake five Telephone Management Referrals, this will transpire into five jobs. This is due to the independent scheduling of each employee based on their availability as it is unlikely they will all be available on the same day.

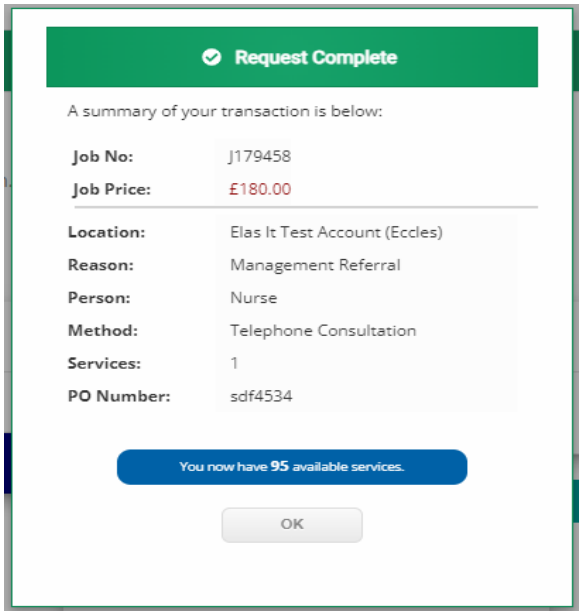


Ordering

Once the correct referrals have been selected, click the order button. A confirmation screen will appear with your choice and the referrals will be added to the 'Available Services' section –

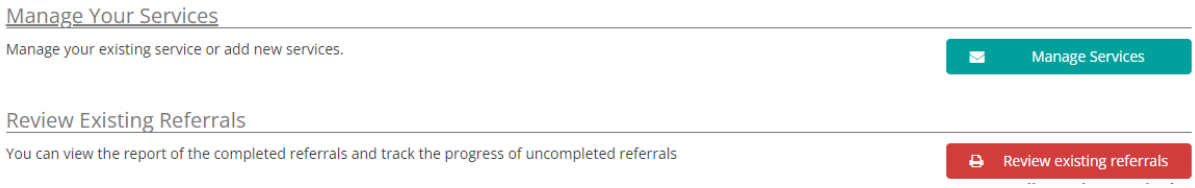


A pop-up screen will then appear detailing the submission. This needs to be acknowledged to continue:-



Review Existing Referrals

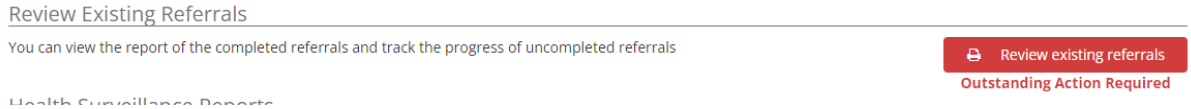
The status of the referral can then be monitored from the 'Review Existing Referrals' section from the home page:-



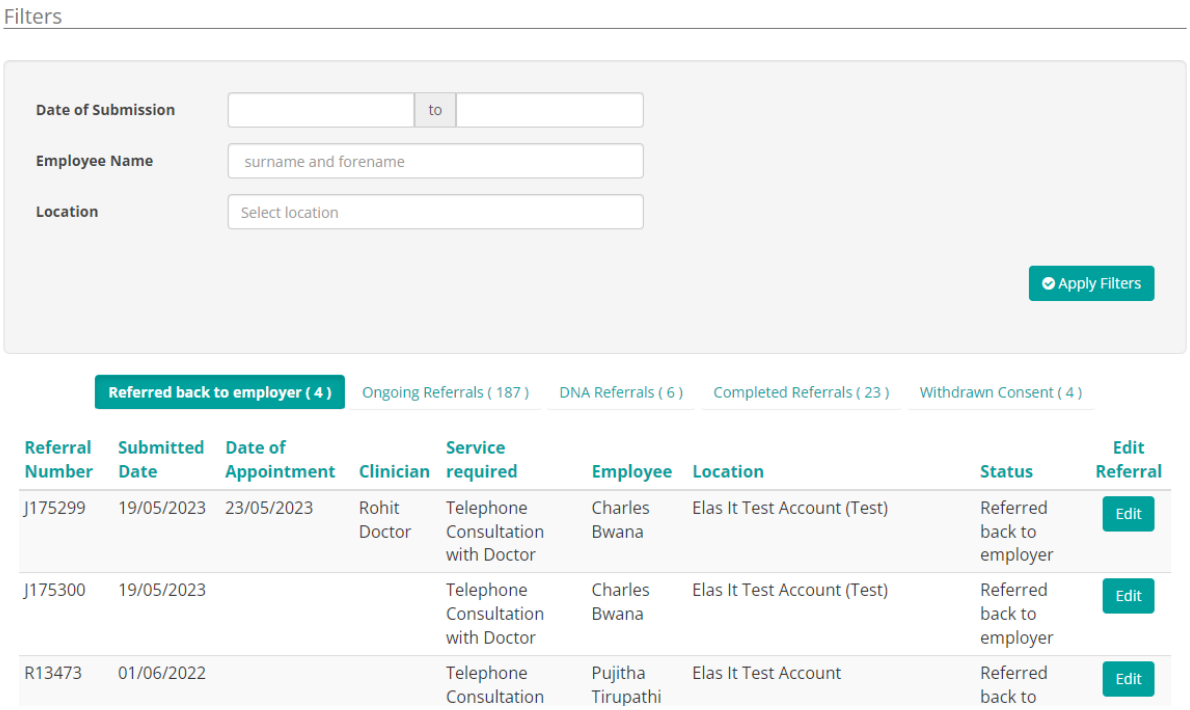
This section will detail the date a referral was submitted, the employee's name and location and the status of the case. Clicking the "view" button will display all information that has been submitted to Occupational Health. The portal within the system will give you a real time status of the case.

Referred back to employer

If the Occupational Health team require any further information that is not included on the original referral then this will be communicated via email notification. The portal will also display the following warning on the homepage:



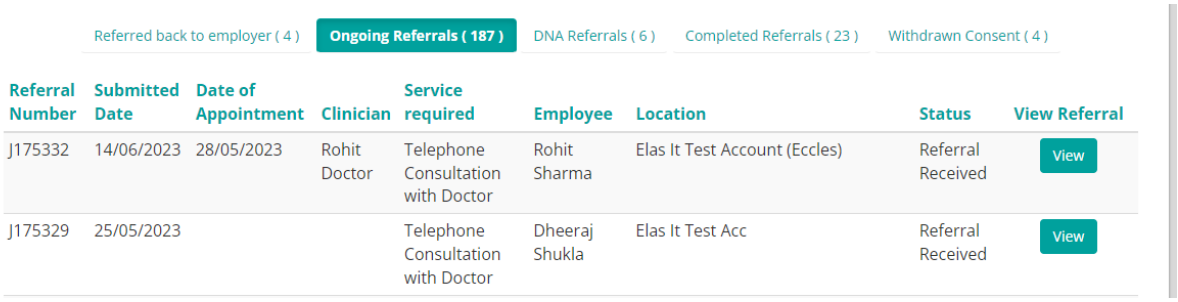
You will need to click into this section to access the referral marked "Referred Back To Employer" by clicking the "edit" button, which will reveal any notes from the Occupational Health team.



Once updated, click on the "Update Referral" button to resubmit the referral once the request from the Occupational Health team has been fulfilled.

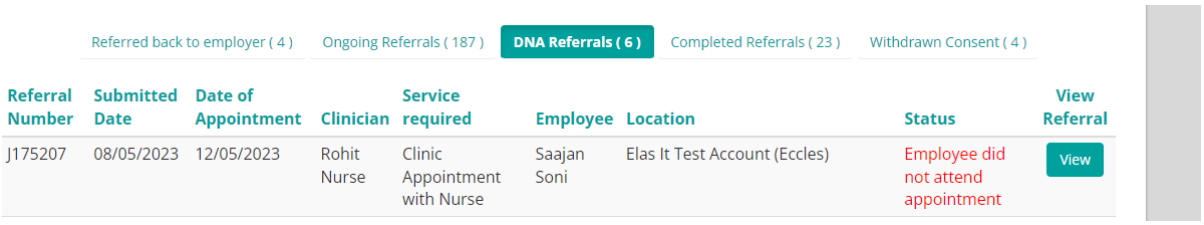
Ongoing Referrals

This displays all the referrals available with the client in all the locations.

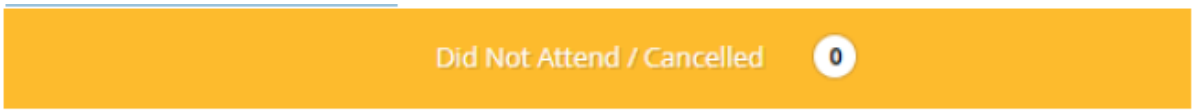


DNA Referrals

This displays all those referrals that were not attended by the employees.



Did Not Attend / Cancelled



This section will display any referrals that have been –

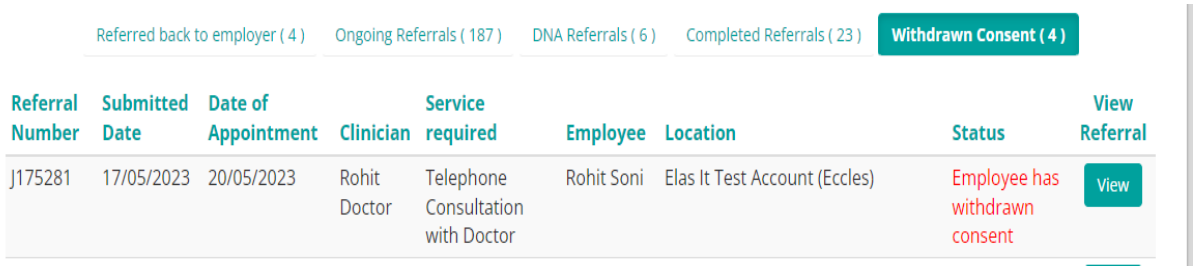
• Marked as Did not attend – Where the employee failed to show at the allotted time with the clinical team member.

• Cancelled within 7 days of the scheduled appointment.

Each referral you can either mark as 'No Action', where you do not wish to rebook the referral. Or re-submit you wish the referral to take place again.

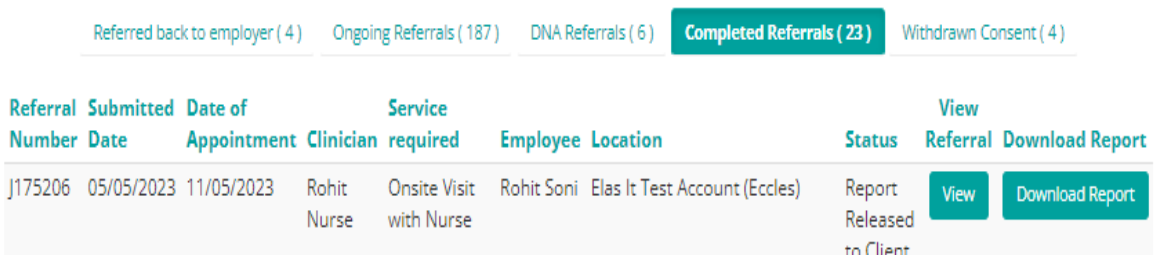
Withdrawn Consent

This displays all those referrals for which employees' consent was withdrawn.



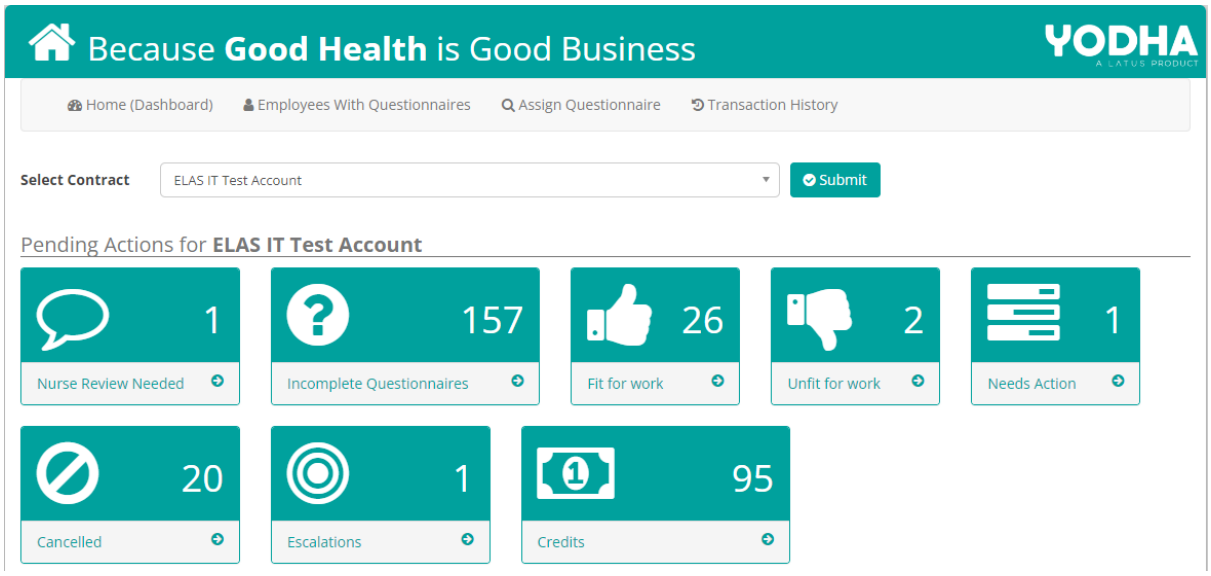
Completed Referrals

On completion of a referral an email will be sent to the referring manager and any additional recipients that may have been entered, that a report is ready to be viewed on the portal. Referral details and reports can be downloaded by selecting the "Completed Referrals" tab within the Review Existing Referrals section.



Questionnaire Dashboard

The preplacement/Questionnaire system is integrated with Yodha online. The online preplacement system helps the client portal users to assign questionnaires to existing or new employees of a specific client, buy credits and view transaction history. Since each user of the system is associated with one or many clients, the user would only be able to access the client(s) associated with him.

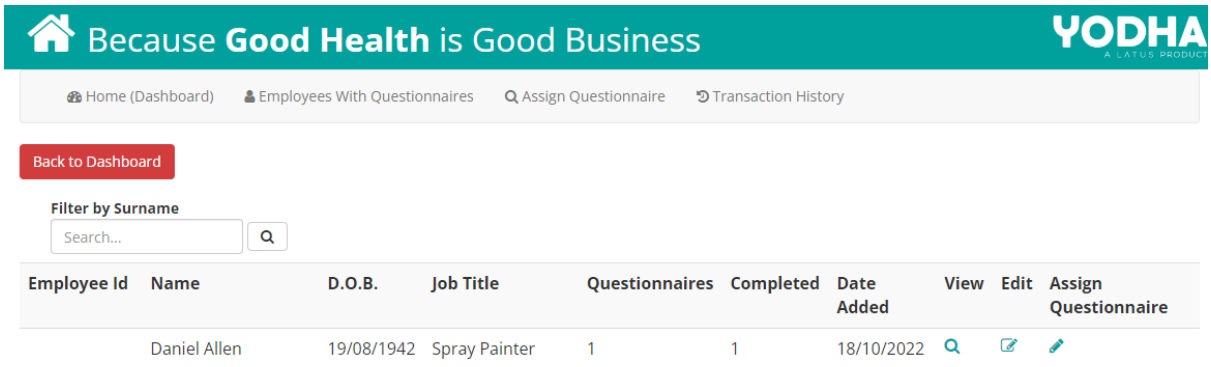


Main dashboard home screen also shows the statistics of questionnaires. The statistics show the following information:

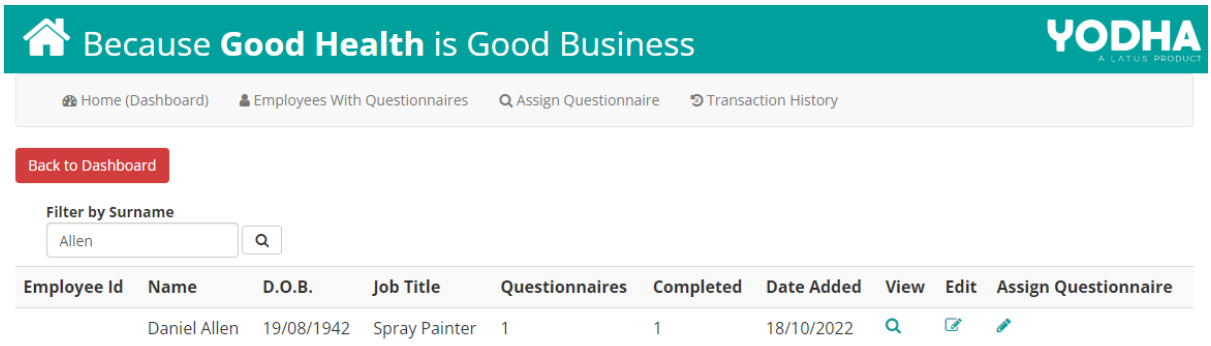
- How many questionnaires need to be reviewed by nurse.
- How many questionnaires need to be completed by employees.
- How many employees are fit for work
- How many employees are unfit for work
- Current Credit available for client

Employees with questionnaires

This section shows the list of all employees who have been assigned preplacement questionnaires. This section also shows how many questionnaires have been assigned to an employee and how many of those questionnaires have been completed by employees. You can edit employee data within this section if required by clicking the edit button.



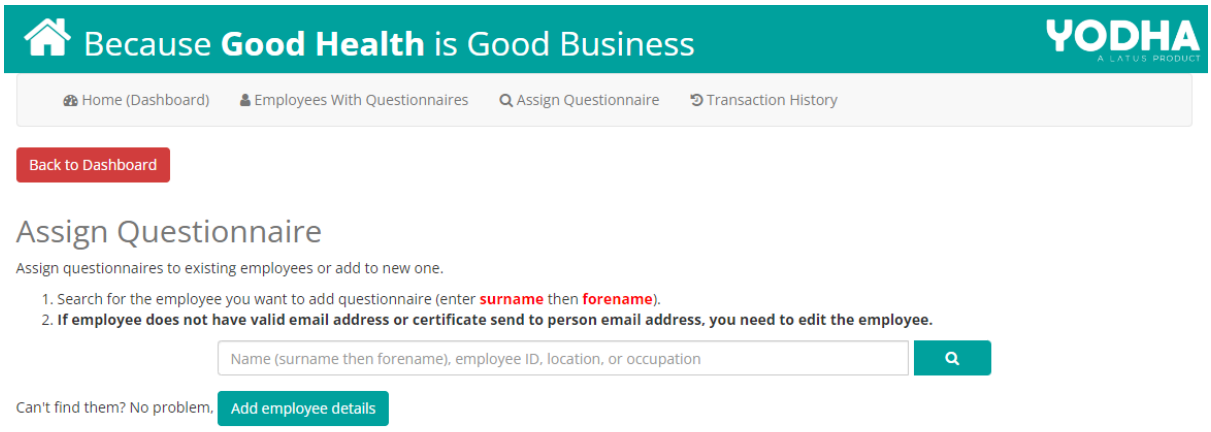
Client portal users can also filter records by inputting the surname of an employee in the text box provided.



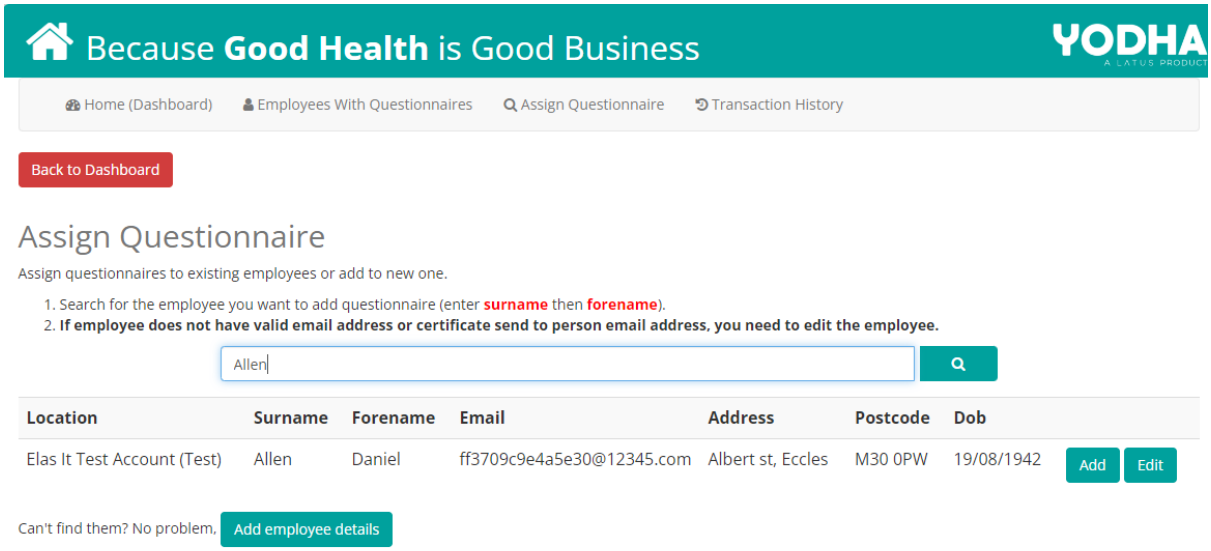
Assign Questionnaire

This section consists of two features:

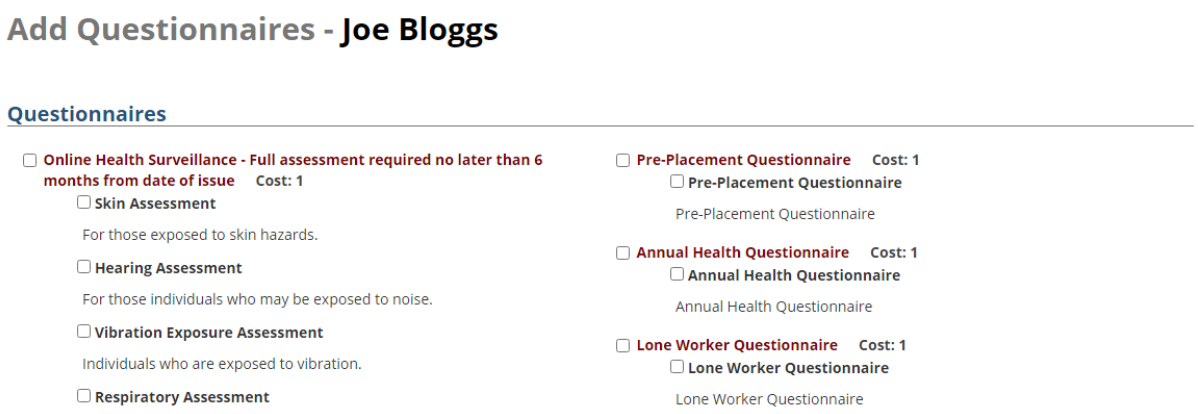
- Search for existing employees and assign questionnaire
- Create new employee and assign questionnaire to newly created employees.



To find an existing employee, enter the surname of the employee and click the  button



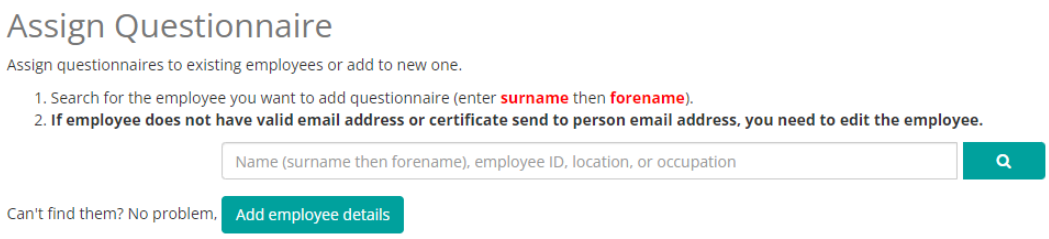
From here, the client portal user can either add a questionnaire to the existing employee by clicking the “Add” button or can edit the details of an employee.



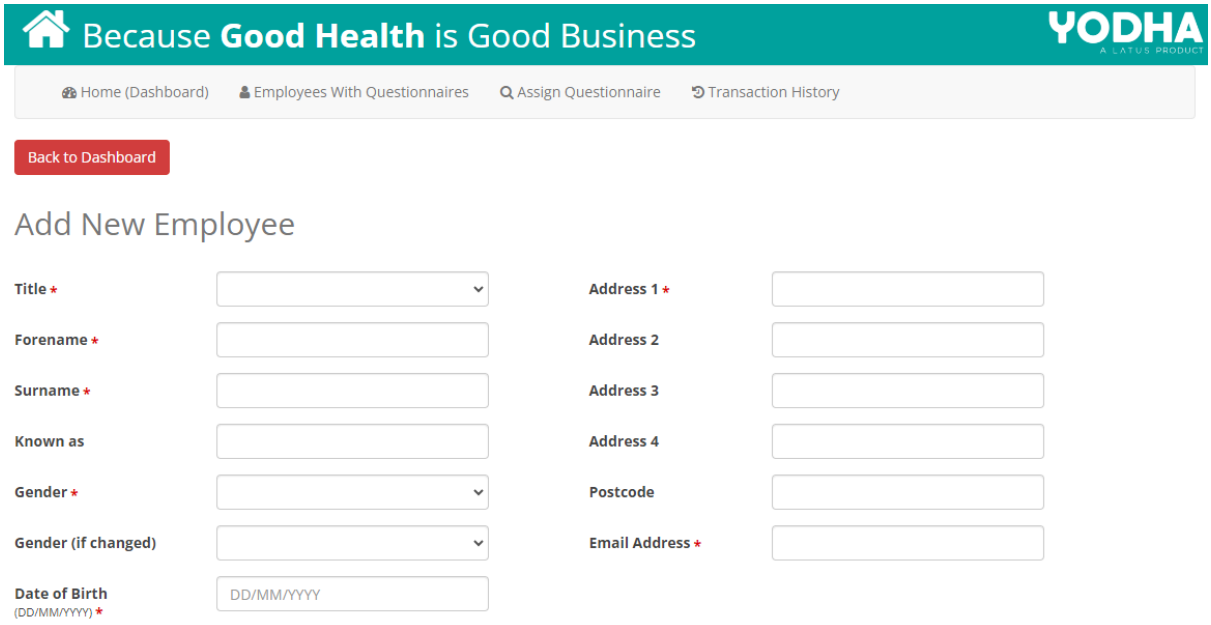
Once the relevant questionnaire/s has been selected and the “Save” button is clicked, an employee is assigned with one or more questionnaires. An email invitation is sent to the chosen employee to complete the questionnaire.

Adding New Employee for Questionnaires

Under “Assign Questionnaire” tab, there is an option present to add new employee details.



Once “Add employee details” button is clicked, the client portal user is prompted to add new employee details.

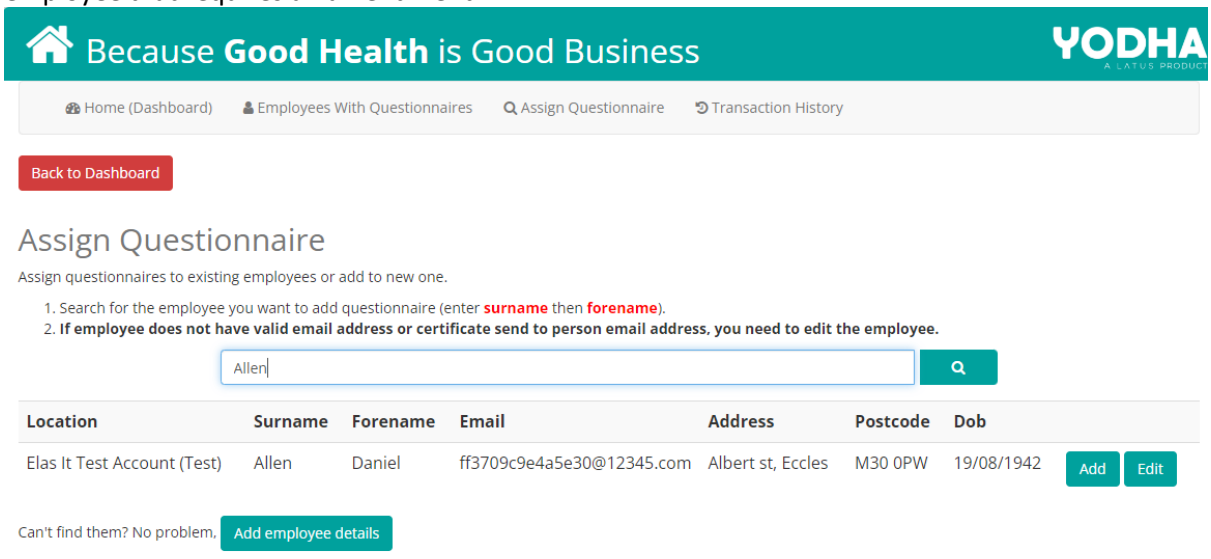


Once all required information is provided and "Save" button is clicked, the client portal user is prompted to assign questionnaires as mentioned in previous steps.

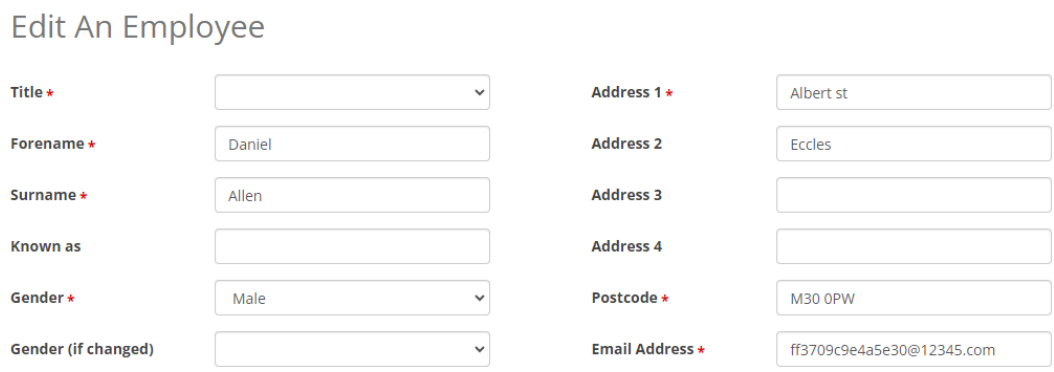
After assignment, the employee would be invited to complete the questionnaire.
Please note that the assignment of questionnaires to an employee is possible only if a client has got sufficient credits available.

Updating Existing Employee Details

The portal user can use the search functionality present under "Assign Questionnaire" tab to find an employee that requires an amendment.



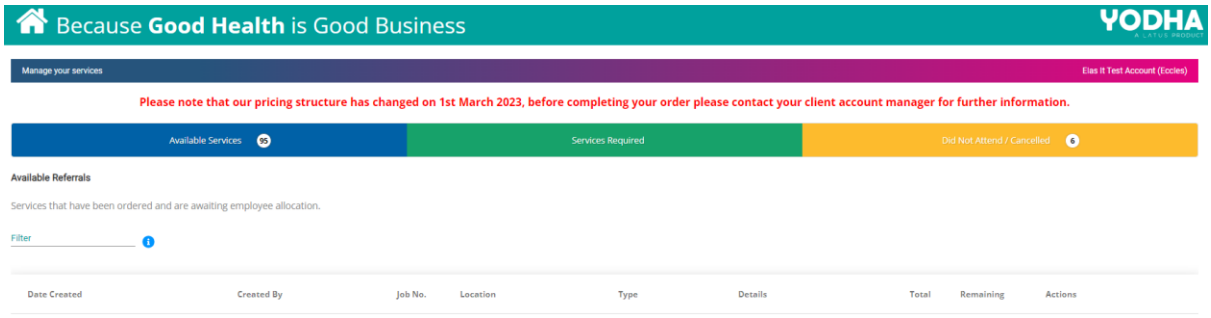
Once the "Edit" button is clicked, the client portal user is prompted to update the existing employee.



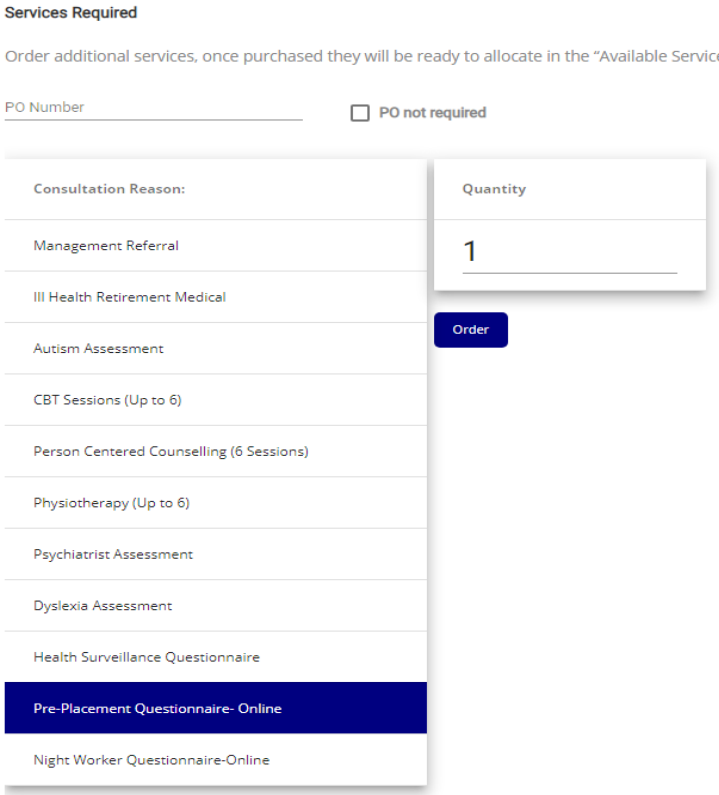
Buy Credits

Portal users can buy credits instantly. When you initially log into the portal, if you select the "Manage Services" section, enter your location and click "Start".

From here you will be directed to the below page:-



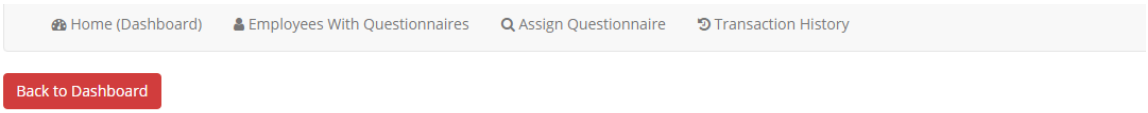
Select "Services Required", enter your PO number or select that a PO is not required, then select the questionnaire credit type you require, enter the quantity and click "Order".



After you have ordered the quantity you require, if you revert back to the home page and select Questionnaire Dashboard, the credits will automatically be available for you to use.

Transaction History

Client portal users can view complete history of their credit transactions. Please note that this transaction history may include the credit transactions conducted by Yodha dashboard admin user.



Back to Dashboard

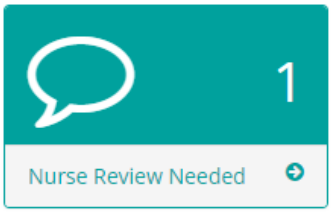
Transaction History

Add/Deduct	Credit	Start Credit	End Credit	Rate per Credit	Date	Note
Deduct	1	775	774	£0.00	17/09/2020 15:34:44	1 credits deducted from account with rate 1 by occhealth@soundadviceltd.co.uk
Deduct	1	776	775	£0.00	17/09/2020 15:32:54	1 credits deducted from account with rate 1 by

This section notes how many credits were added, what was the starting credit and rate per credit.

Statistics

Nurse Review Needed

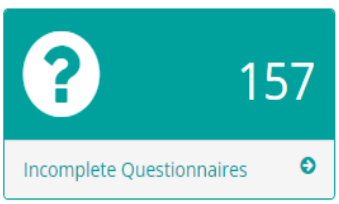


This section shows how many questionnaires need to be reviewed by nurse. Client portal users can view details by clicking on the box.

Employees Needing Review

Employee Id	Name	D.O.B.	Job Title	Questionnaire Title	Date Completed
	TEST	18/07/1992	Test	Pre-Placement Questionnaire	22/07/2021 15:58

Incomplete Questionnaires



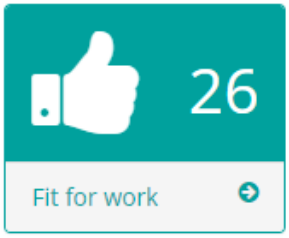
This section shows how many questionnaires are incomplete.

Employees with Incomplete Questionnaires

Employee Id	Name	D.O.B.	Job Title	Questionnaire Title	Date Questionnaire Assigned	Action
	Rohit Soni	02/02/2000	Cleaner	Pre-Placement Questionnaire	13/06/2023 16:27	Cancel Assignment Send Reminder

From here users can view the questionnaires assigned to their employees and can also send reminder emails to an employee that is yet to complete the questionnaire issued to them.

Fit for work

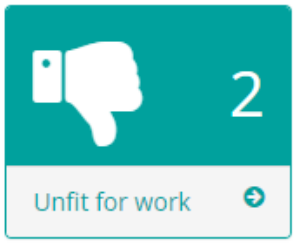


This section shows the number of employees fit for work. The employees appear to be fit once they are reviewed and declared fit by an internal nurse.

Fit Employees

Employee Id	Name	D.O.B.	Job Title	Questionnaire Title	Fit For Work	Date Reviewed
	Testname Testname	01/01/1970		Pre-Placement Questionnaire		12/07/2019 09:45

Unfit for work



This section shows the number for employees declared unfit for work by internal nurse.

Unfit Employees

Employee Id	Name	D.O.B.	Job Title	Questionnaire Title	Fit For Work	Date Completed
	Test	18/07/1992	Test	Online Health Surveillance - Full assessment required no later than 6 months from date of issue		16/10/2020 10:21

Credits

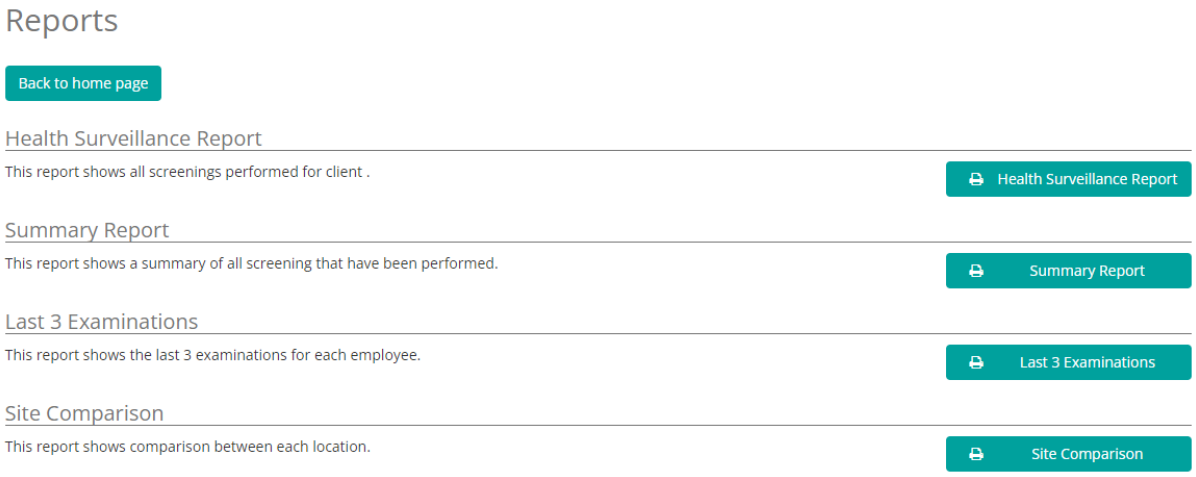


This section shows the number of credits available to be used.

Health Surveillance Reports

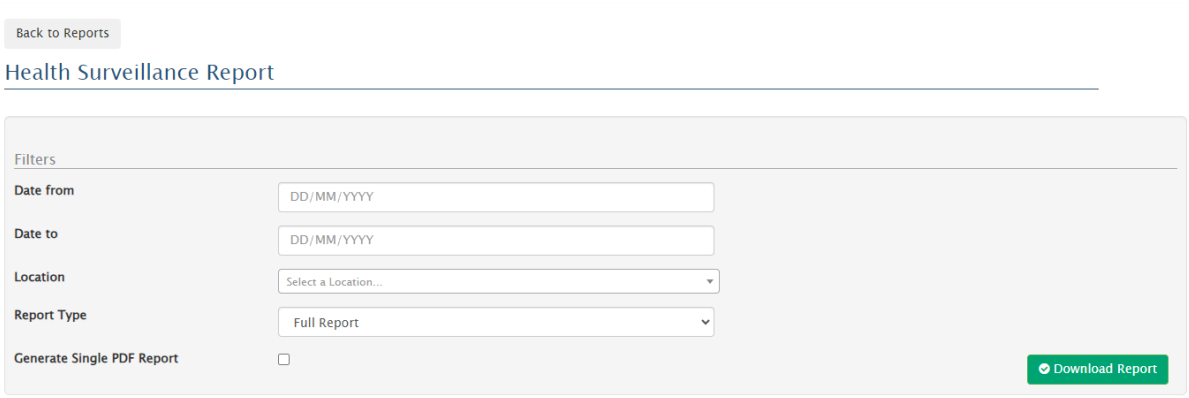
This section of the portal will enable you to view your health surveillance results following site visits. The portal is broken down into 4 sections:

- Health Surveillance Report
- Summary Report
- Last 3 examinations
- Site Comparison



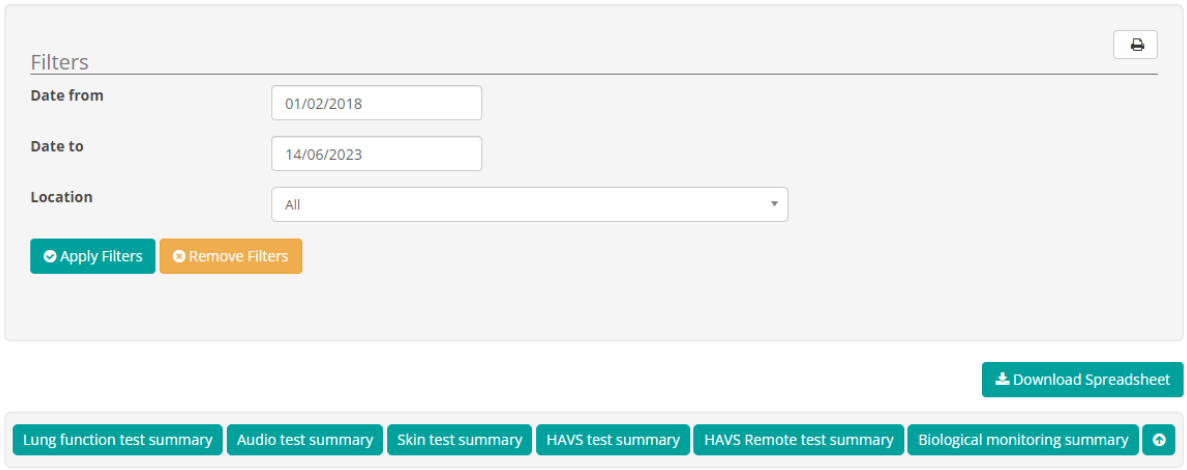
Health Surveillance Report

This section enables you to filter and download the screening results performed by Tech/Nurse/Doctor. Once you select “Download Report”, the results will be downloaded in Pdf format.



Summary Report

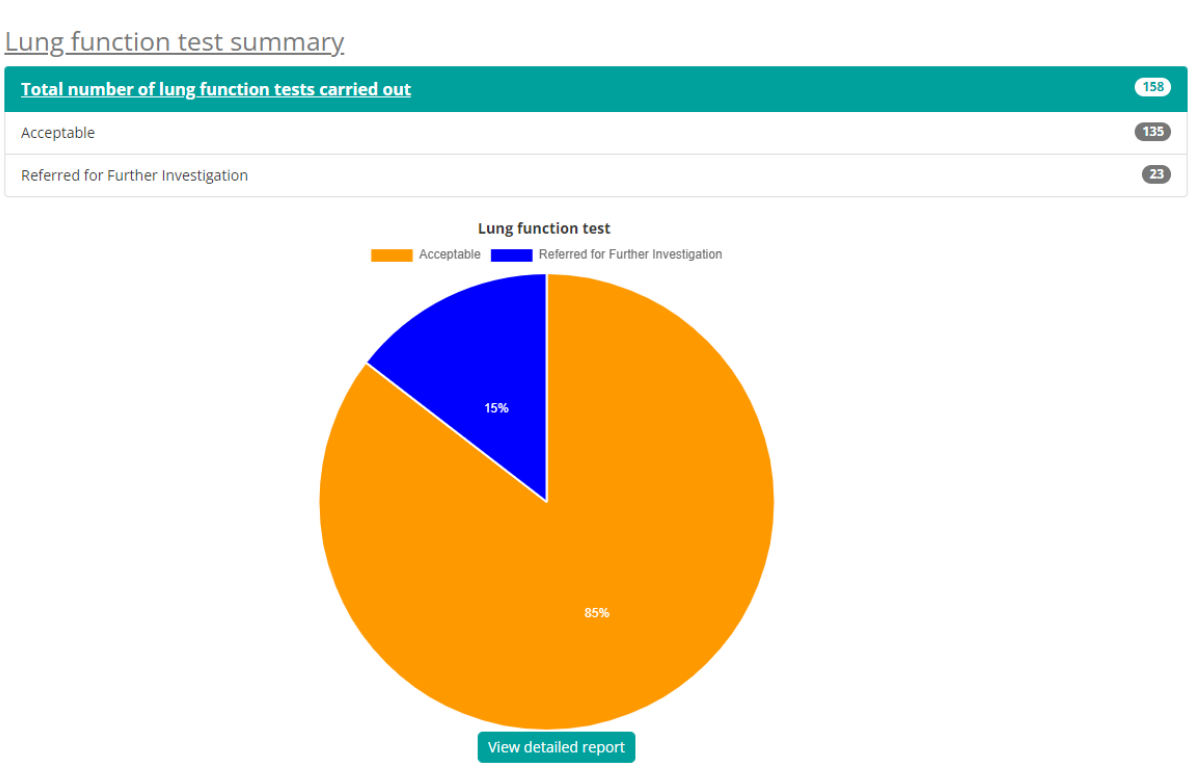
This section enables you to filter results via date and/or individual location. Once you select “apply filters” the results will be displayed. These reports can be exported into excel.



This section will provide a breakdown of the type of test and outcome

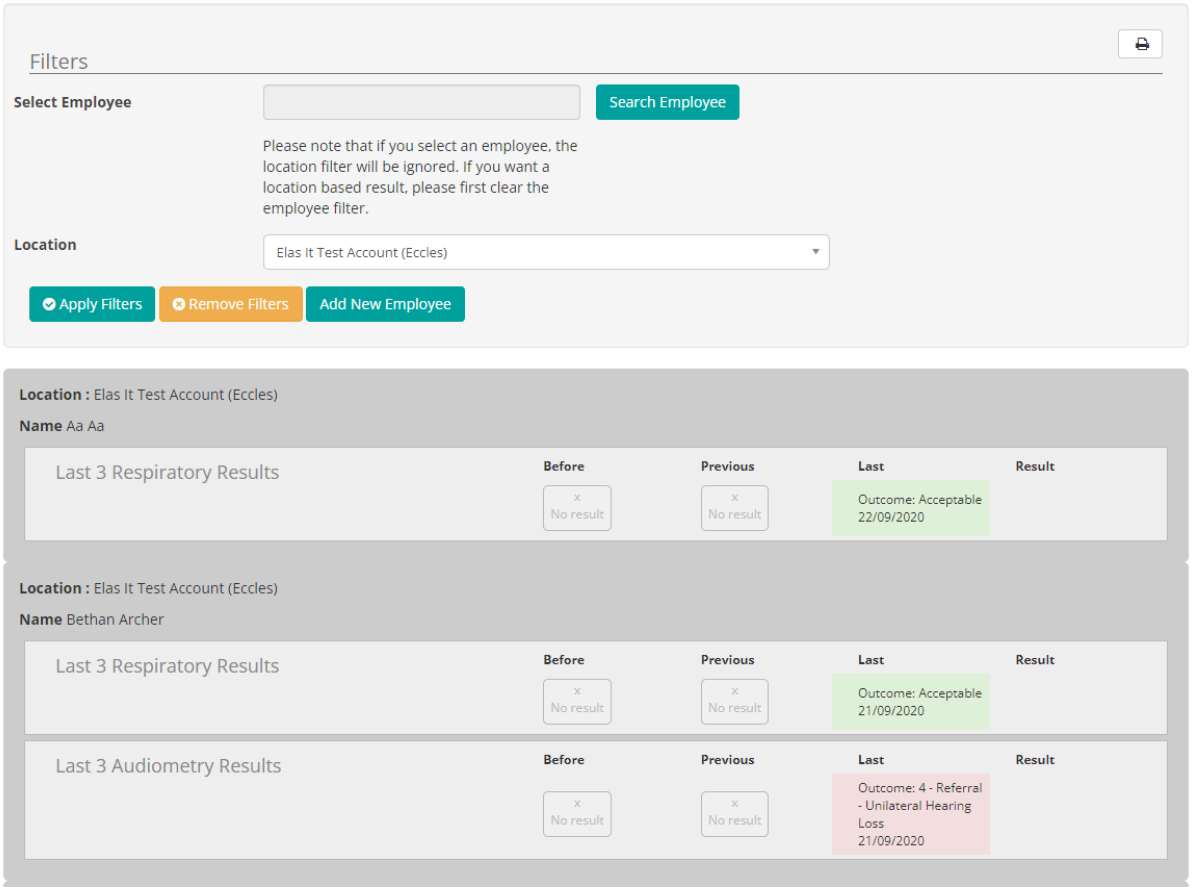
- Lung function
- Audiometry
- Skin
- HAVs Tier 2, Tier 3 or Tier 4

By clicking on the outcomes, you will be able to see a breakdown of the information. Alternatively, you can click on “View detailed report” which will display a breakdown including employee name, location, occupation, screening date and the outcome of the test.



Last 3 Examinations

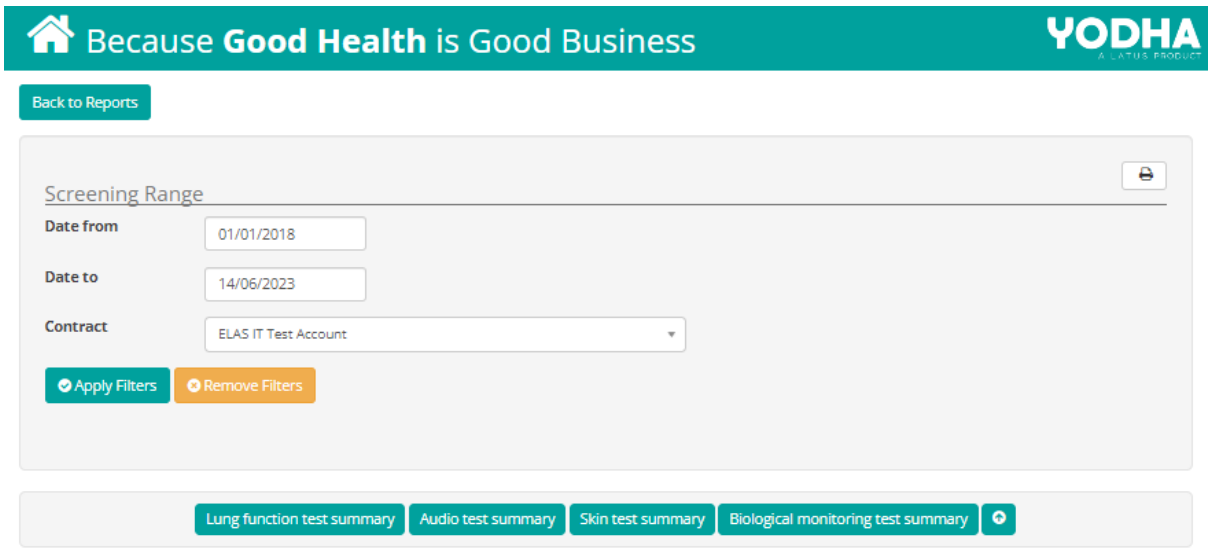
This section will allow you to display the last three assessments and trends for specific employees, or employees who work within the same location. These reports can be exported into excel.



Site Comparison

This section allows you to run comparisons across multiple locations. You can also select a tailored date range.

This will detail by location the latest site visit date, the number of visits and the breakdown of the type of tests and outcome. These reports can be exported into excel.



Lung function test summary

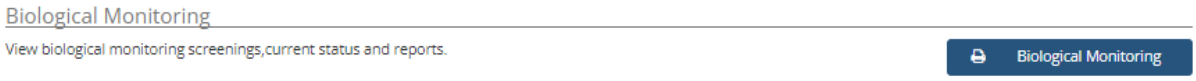
			Total Lung Function Tests (LFT)	LFT Acceptable	LFT Referred for Further Investigation
Latest Site Date	**No. of Visits**	**Site/Location attended**			
19/05/2023	40	Elas It Test Account (Eccles)	152	128	24
15/12/2020	2	Elas It Test Account (Test)	4	4	0
04/04/2019	1	Elas It Test Account	3	3	0

Audio test summary

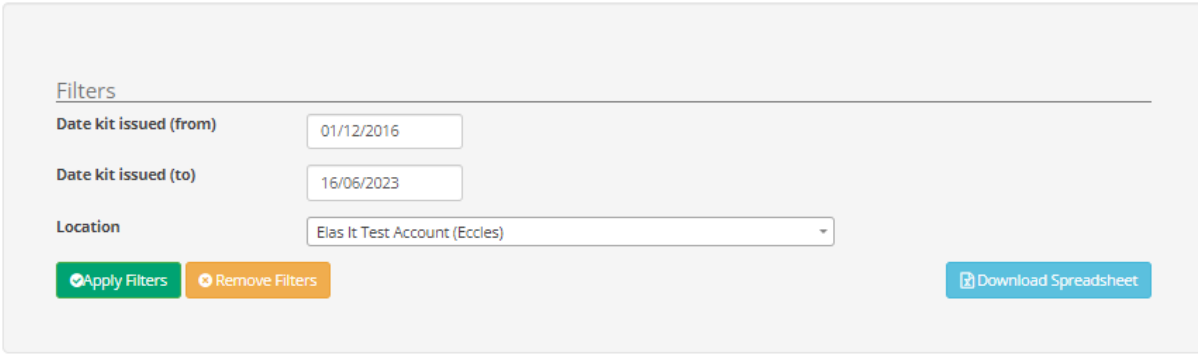
			Total Hearing Tests	Cat 1	Cat 2	Cat 3	Cat 4
Latest Site Date	**No. of Visits**	**Site/Location attended**	**19**	**11**	**0**	**1**	**7**
21/09/2020	4	Elas It Test Account (Eccles)	12	8	0	1	3
15/12/2020	4	Elas It Test Account (Test)	7	3	0	0	4

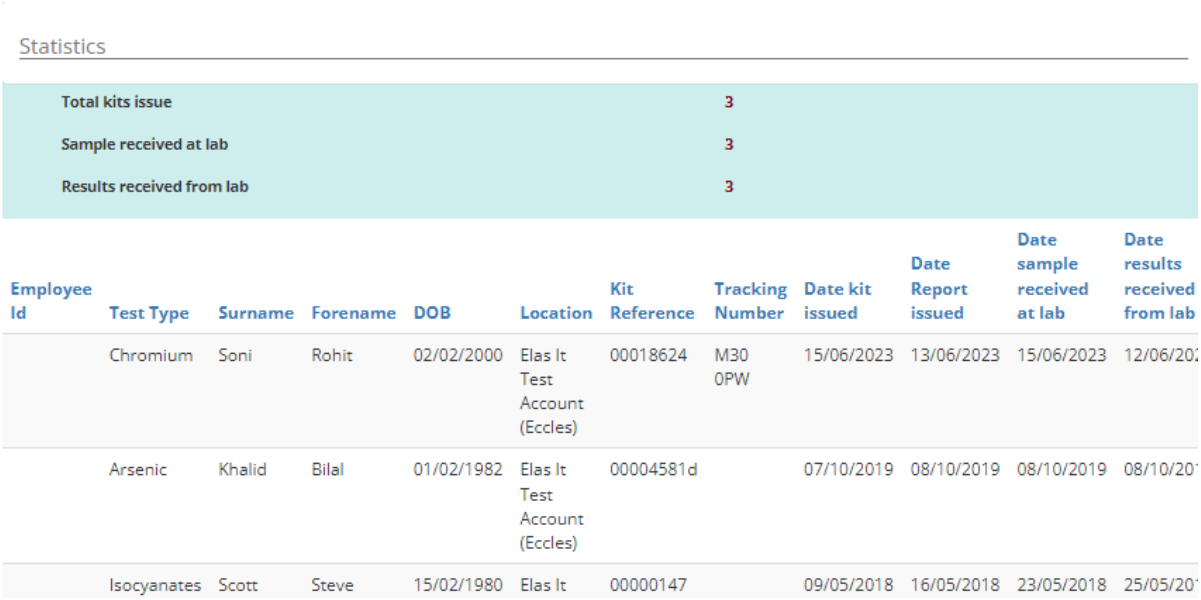
Biological Monitoring

This section will allow you to display all biological monitoring records belonging to associated client's sites. These reports can be exported into excel.



Once clicked on "Biological Monitoring" button, it will lead to below screen:





Employee Id	Test Type	Surname	Forename	DOB	Location	Kit Reference	Tracking Number	Date kit issued	Date Report issued	Date sample received at lab	Date results received from lab
	Chromium	Soni	Rohit	02/02/2000	Elas It Test Account (Eccles)	00018624	M30 0PW	15/06/2023	13/06/2023	15/06/2023	12/06/20
	Arsenic	Khalid	Bilal	01/02/1982	Elas It Test Account (Eccles)	00004581d		07/10/2019	08/10/2019	08/10/2019	08/10/20
	Isocyanates	Scott	Steve	15/02/1980	Elas It	00000147		09/05/2018	16/05/2018	23/05/2018	25/05/20

From here , all the records can be viewed and can also be exported to spreadsheet.

Management Referral Dashboard Status Guide

Dashboard Status	Explanation
Referral Received	The referral has been accepted into our online portal but has yet to be triaged by the occupational health team to ensure that the correct form of action has been taken.
Pending Assessment Date	The referral has now been triaged by the client account manager and this is now with our scheduling team to make the appropriate arrangements for the consultation.
Appointment Confirmed	The appointment has been confirmed but has not yet taken place.
Employee Did Not Attend	The client account manager should contact you to advise of any non-attendance charges and ask for your authority to rebook the appointment.
Awaiting Report	The individual has attended their appointment and the clinician is currently collating the report.
Employee Reviewing	The report has been submitted and the individual will have a designated period of time to review the report, prior to it being released on your portal.
Employee Rejected Report	The employee has received a copy of the report and they have questions that need to be reviewed by the clinician, which are delaying its release. The client account manager will liaise with the employee to resolve their questions in association with the clinician.
Employee Has Withdrawn Consent	The client account manager will advise on any relevant next steps. This is a rare outcome and we would try to take a number of steps with the employee to reverse this decision.
Report Released To Client	The referral is now complete and closed.