

GCC Cority

Management referral process

For Managers

6 Steps

FOR MANAGERS - myCority

Important information for managers – Please read prior to making a management referral on myCority

Please ensure the employee information submitted is correct including:

- **Correct spelling of all names**
- **Use correct first names (not shortened names)**
- **Correct date of birth**
- **Preferred telephone number**
- **Personal email address – Please do not use work email addresses. The email address provided should be a personal email address. This is how the employee will be notified of their appointment and how they will provide their consent to release their OH report, if applicable.**

If you provide work email credentials for your employee and they are absent from work they will not receive their appointment notification thus potentially impacting on their attendance.

Please check the consent information provided at the beginning and end of the referral form. **It is essential the employee gives their consent to both the information you provide within the referral and the questions you wish to ask.**

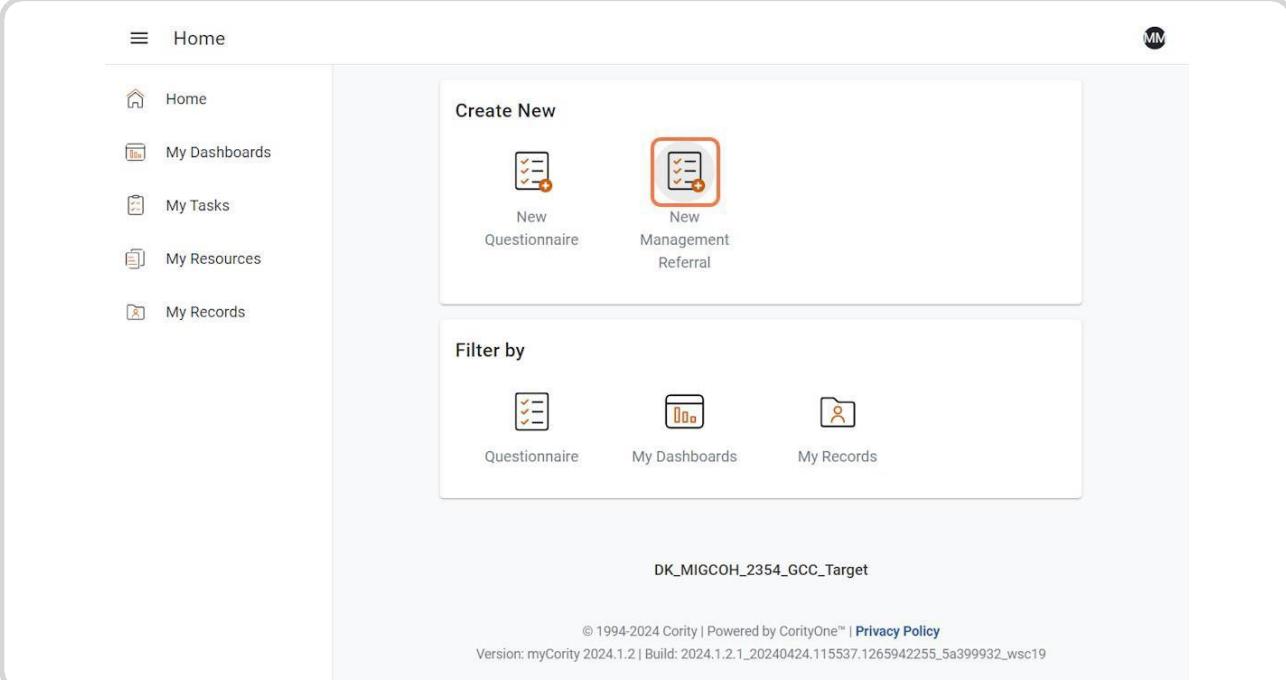
Referring Managers will receive email notifications from the Cority system when the consent status of the Occupational Health report changes – for example when consent is provided by the employee or when consent is declined.

Reports are only accessible via the myCority system **by the referring manager** in line with GDPR. Should a referring manager feel the need to share an Occupational Health report/advice contained within the report on a need to know basis (with HR for example), **the referring manager must discuss this with the employee directly.** Occupational Health cannot release copies of the report to other managers/HR.

Employees also have access to their Occupational Health report via their own myCority account. Subsequently, should duplicate copies of reports be required for any reason the employee can access their own myCority account and download/print their specific report as required.

STEP 1

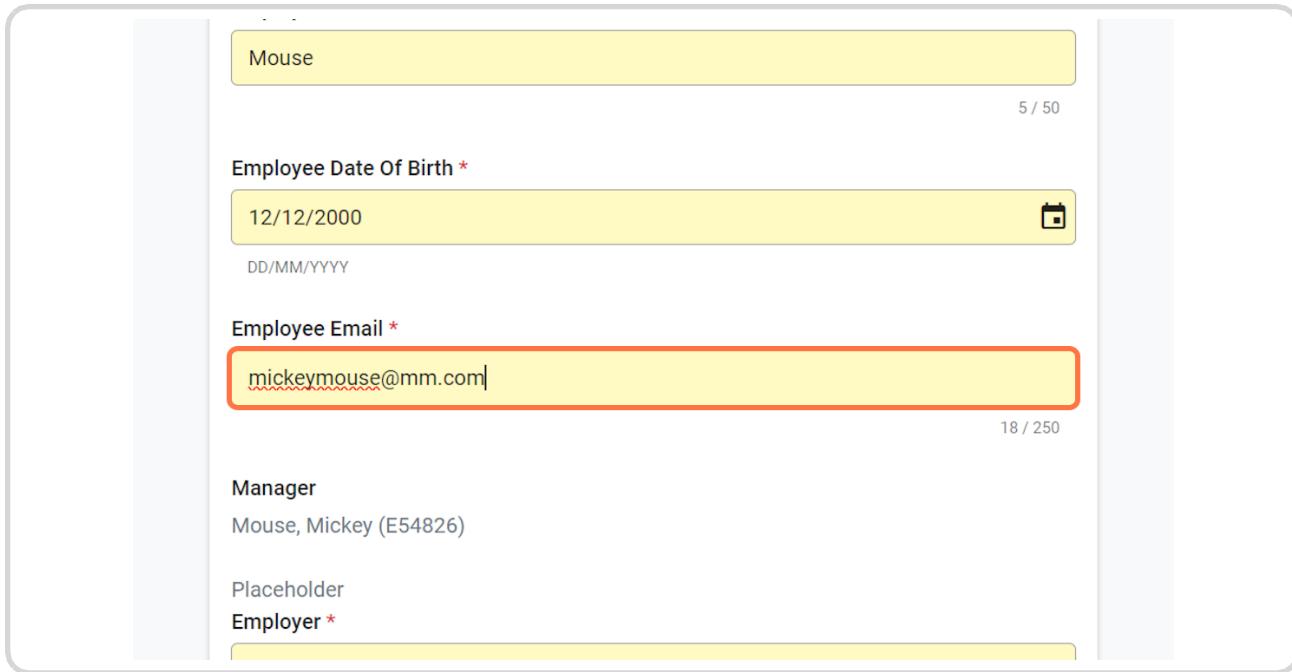
Click on New Management Referral



The screenshot shows the Cority software interface. On the left, a sidebar menu includes 'Home', 'My Dashboards', 'My Tasks', 'My Resources', and 'My Records'. The main area is titled 'Create New' and contains two options: 'New Questionnaire' and 'New Management Referral'. The 'New Management Referral' option is highlighted with a red box. Below this, a 'Filter by' section includes icons for 'Questionnaire', 'My Dashboards', and 'My Records'. At the bottom of the main area, the text 'DK_MIGCOH_2354_GCC_Target' is displayed. The footer contains the copyright notice '© 1994-2024 Cority | Powered by CorityOne™ | Privacy Policy' and the version information 'Version: myCority 2024.1.2 | Build: 2024.1.2.1_20240424.115537.1265942255_5a399932_wsc19'.

STEP 2

Complete employee details The email address provided will be the email used to notify the employee of their OH appointment. **Please provide the employee's personal email address.** If the employee does not have a personal email address, please state "not known" and the appointment will be released via post to the address you provide in box "full home address including postcode".



Mouse

5 / 50

Employee Date Of Birth *

12/12/2000

DD/MM/YYYY

Employee Email *

mickeymouse@mm.com

18 / 250

Manager

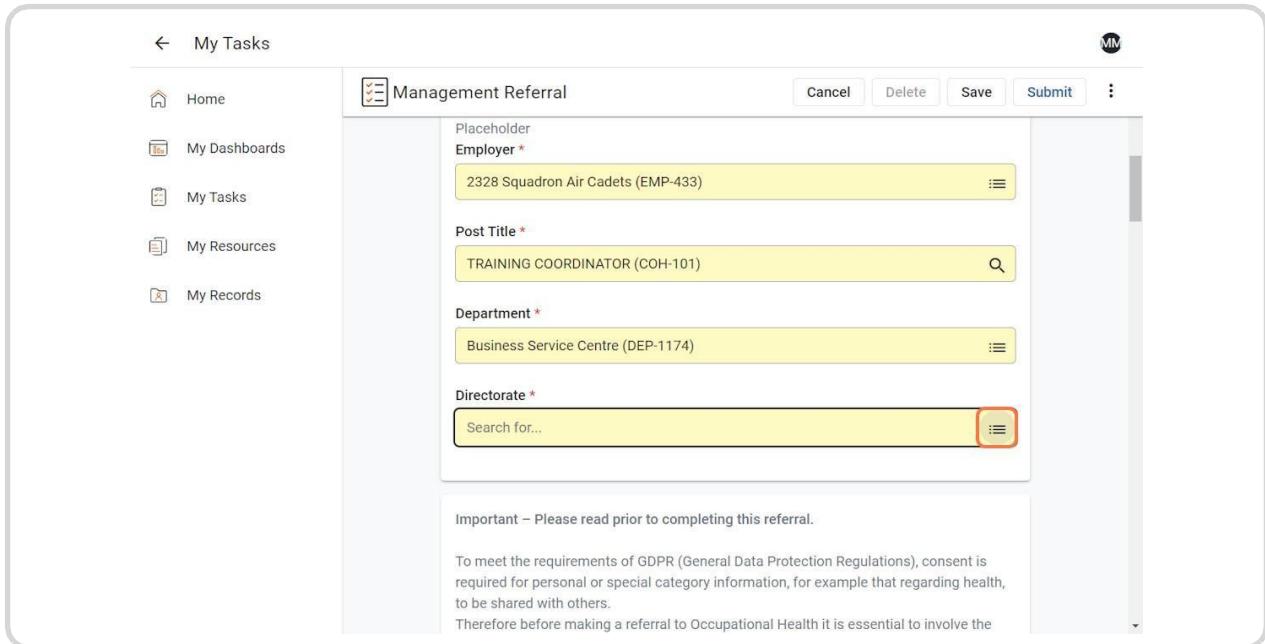
Mouse, Mickey (E54826)

Placeholder

Employer *

STEP 3

All yellow fields are mandatory



← My Tasks

Management Referral

Placeholder Employer *

2328 Squadron Air Cadets (EMP-433)

Post Title *

TRAINING COORDINATOR (COH-101)

Department *

Business Service Centre (DEP-1174)

Directorate *

Search for...

Important – Please read prior to completing this referral.

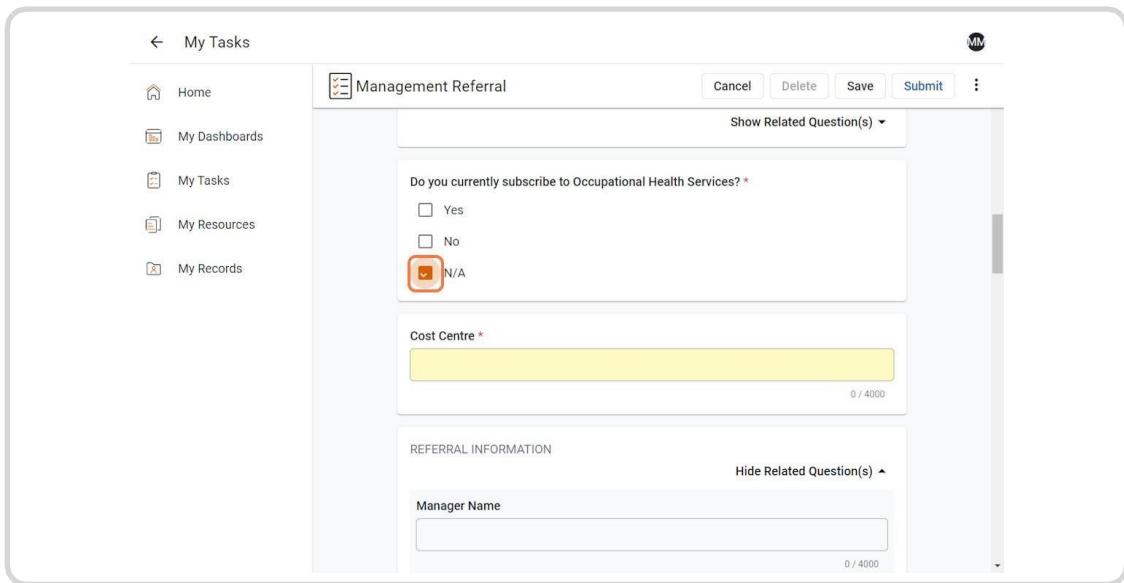
To meet the requirements of GDPR (General Data Protection Regulations), consent is required for personal or special category information, for example that regarding health, to be shared with others.

Therefore before making a referral to Occupational Health it is essential to involve the

STEP 4

Scroll down and complete the management referral questionnaire. If you are referring from Gloucestershire County Council click “No” to subscribing question.

In order to get the most from your referral, please select the appropriate reason for referral, provide a brief background and indicate the specific relevant questions you wish to be addressed within the subsequent report. Free text questions can be also be asked if appropriate. Additional questions cannot be asked once the referral is submitted.

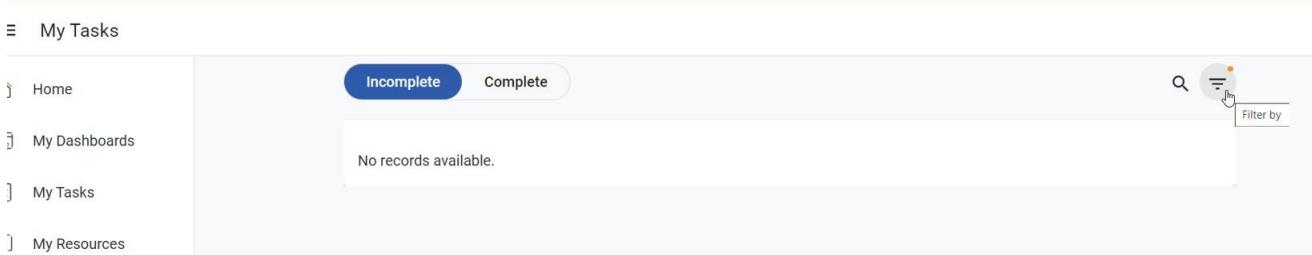


The screenshot shows a software interface for a 'Management Referral'. On the left is a sidebar with 'My Tasks' selected. The main area has a title 'Management Referral' with buttons for 'Cancel', 'Delete', 'Save', 'Submit', and a filter icon. A dropdown menu 'Show Related Question(s)' is open. The first question is 'Do you currently subscribe to Occupational Health Services? *' with three options: 'Yes', 'No', and 'N/A', where 'N/A' is checked. Below it is a 'Cost Centre *' field with a yellow background and a character limit of 4000. A section for 'REFERRED INFORMATION' follows, containing a 'Manager Name' field with a character limit of 4000. The 'Save' button is visible at the bottom of the form.

STEP 5

If required you can save the referral for completion at a later date by clicking save not submit. **Occupational Health will not receive saved referrals – only submitted referrals.**

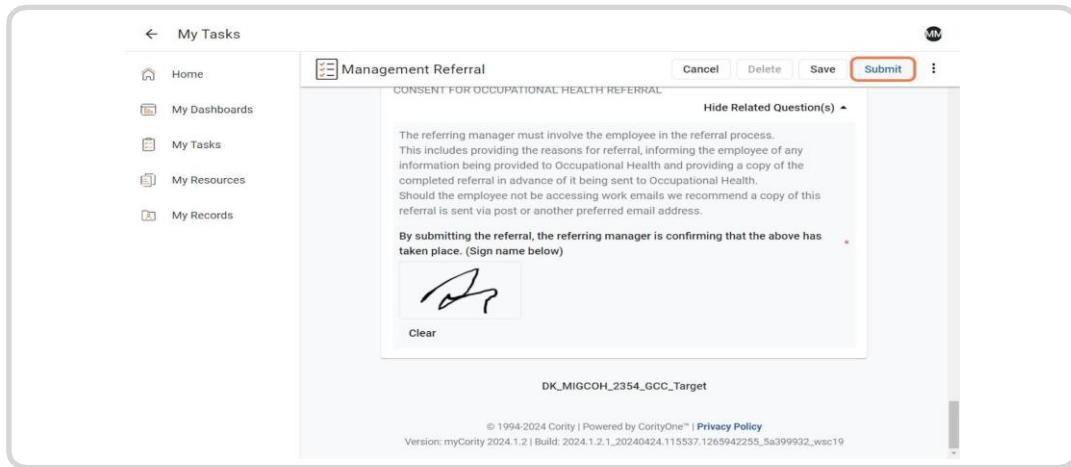
To return to a saved referral, go to My Tasks, then click on the filters tab on the top right hand corner and untick assigned to me. Your incomplete referrals will then be available for editing and updating as required.



The screenshot shows a 'My Tasks' page. On the left is a sidebar with 'My Tasks' selected. The main area has a search bar and a 'Filter by' button. A button for 'Incomplete' is highlighted in blue, while 'Complete' is in grey. Below the search bar, it says 'No records available.'

STEP 6

When fully completed click on submit. Once submitted referrals cannot be edited or changed.



The screenshot shows a user interface for managing a referral. On the left, a sidebar lists 'My Tasks' with options: Home, My Dashboards, My Tasks, My Resources, and My Records. The main area is titled 'Management Referral' and contains a 'CONSENT FOR OCCUPATIONAL HEALTH REFERRAL' section. It includes a note about involving the employee in the process, a checkbox for confirming the above has taken place, and a signature field with a placeholder 'DK_MIGCOH_2354_GCC_Target'. At the bottom, there is a copyright notice for CorityOne and a version number: '© 1994-2024 Cority | Powered by CorityOne™ | [Privacy Policy](#)
Version: myCority 2024.1.2 | Build: 2024.1.2.1_20240424.115537.1265942235_5a399902_wsc19'.

To view the appointment date click on My Records

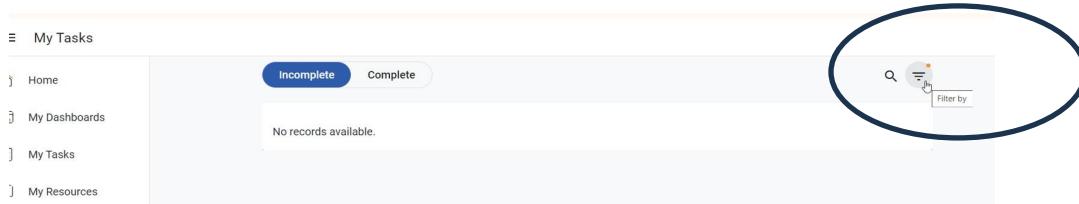
 **My Records**

Select the relevant Case/management Referral

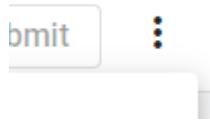
Scroll down to view the First Offered Date, First Attended Date etc.

To share your referral with your employee, you can convert your referral to a PDF, at any stage of this process.

Go to My Tasks, then click on the filters tab on the top right hand corner and untick assigned to me. Your incomplete/complete referrals will then be available.



Select the referral you wish to convert to a PDF/share with the employee. Click on the the 3 dots in the right hand corner.



Click on Print or Export

Then select Print or Export to PDF

To return to your myCority account click the X in the top right hand corner.

Other guidance on viewing Occupational Health reports, referrals and exporting to PDFs is available in the associated guide:

“Exporting Management reports to PDF in myCority”

Remember:

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Employees also have access to their Occupational Health report via their own myCority account. Subsequently should there be a change in manager the employee can access their own myCority account and download a copy of the specific report should this be deemed helpful.

The logo for Tango, featuring the word "Tango" in a stylized, orange, cursive font.

Never miss a step again.