Occupational Health Referral Portal User Guidance

Familiarise yourself with the Colleague Handbook for guidance on the services available, when to refer to Occupational Health and how to make a good referral: Occupational Health Service Colleague Handbook
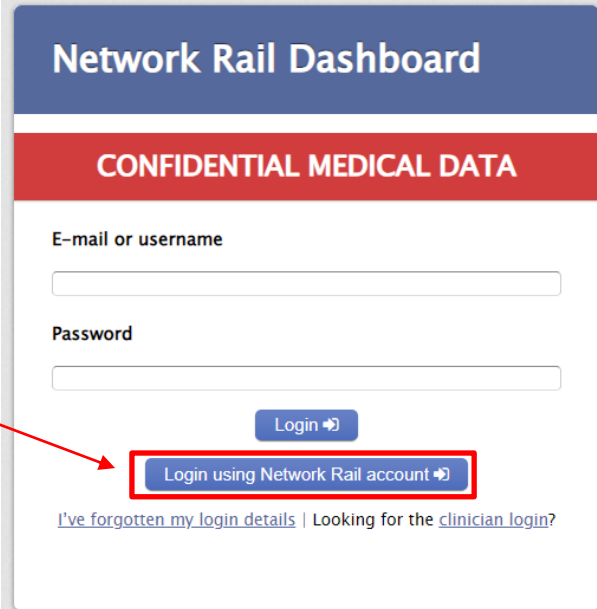
Step 1. Accessing the portal:

Before you start, make sure you're in a private space so confidential information added to the referral cannot be seen by people who shouldn't. Remember to always lock your device if you step away.

Network Rail users can access the portal via the following link: https://networkrail.orchidlive.com/orchid/dashboard/default/sso

Network Rail managers can automatically access this securely via Single Sign On. If you need access to the portal to make a referral, please log a request via: Orchid Live System Queries - Service Portal (service-now.com)

If you log out of the portal, simply click on the 'Login using Network Rail account' button to re-enter. Your Network Rail identity will give you access with the right permissions.

Step 2. Starting your referral for an employee:

On the menu, you can make a referral, view case statuses for Management Referrals you have made and securely access documents relating to a specific case which you have access to.

Click on 'Refer an employee' to start a referral:
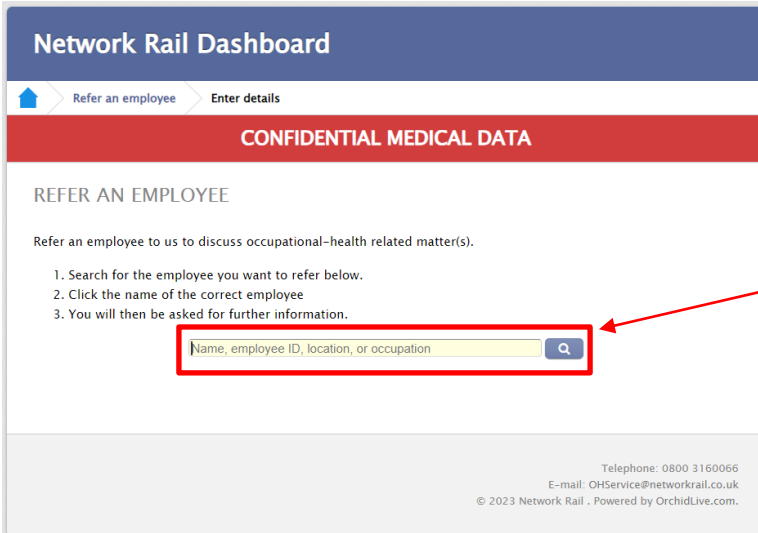
On the next screen, enter the employee number of the employee you need to refer and select the correct person:

Step 3. Choose the type of referral for your selected employee:

On the next screen, select the button next to the type of referral you need to make:

- **Management Referral**
  Occupational health advice for managers and Human Resources in managing absence, supporting attendance at work, and understanding an employee's ability to work (Performance and Attendance Management Referral). A request for a member of the Occupational Health team to join a Case Conference can also be made.

- **Fitness for Task**
  Assessment by Occupational Health of an employee's fitness to carry out a specific work task. For example, Night Worker, Working at Height, FLT and Buggy Driver.
- **Health Surveillance**
  Assessment of the impact of work hazards on an employee's health in compliance with legislation. Health surveillance may include Skin, Respiratory, Audiometry, Hand Arm Vibration Syndrome, Respirable Crystalline Silica.

When you select Management Referral, Health Surveillance or Fitness for Task categories, you'll be given some further options to choose from.

Step 4. Completing the referral form:

The following parts of the referral are optional:

- The employee can choose to share gender identity and preferred pronouns if they wish you to, this enables the practitioner to address the employee as they would like in communications.
- If a HR or secondary contact is needed to be included in the referral, e.g., for coverage of upcoming leave or support, this should be agreed with the employee and included.
- Appointments will be arranged at the centre closest to the employee's home address by default, however, you can choose a preferred centre location which may be best for the employee.
- Any adjustments can be requested to support the employee at the appointment.

When completing the referral, please include as much relevant information as possible in the boxes provided. This will help make the process quicker and make it easier to deliver the service you need.

Please read the 'How to make a good referral' section of the Occupational Health Service Colleague Handbook for further support on a management referral.

Step 5. Confirming the declaration before submitting referral:

Once you've entered all the information needed to support the referral, carefully read the declaration before submitting the referral to Occupational Health.
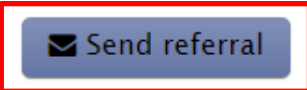
The form will alert you to any mandatory details which haven't been entered.

Declaration: ☐ **This field is required.**

I confirm that I have discussed the reason for this referral with the employee and they are aware of the information being requested and the provision of supporting documents.

I have explained to the employee that as a result of this referral, a report will be provided to me and the HR/secondary contact (if named) and the employee has provided their consent for this.

I confirm the employee agrees to attend an Occupational Health Assessment.

✉ Send referral

The Occupational Health Team will process your referral and make contact if any further information is required.

If you need to contact the team for guidance please call: 0800 3160066.