

Orchid Live Referral Dashboard User Guide

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:

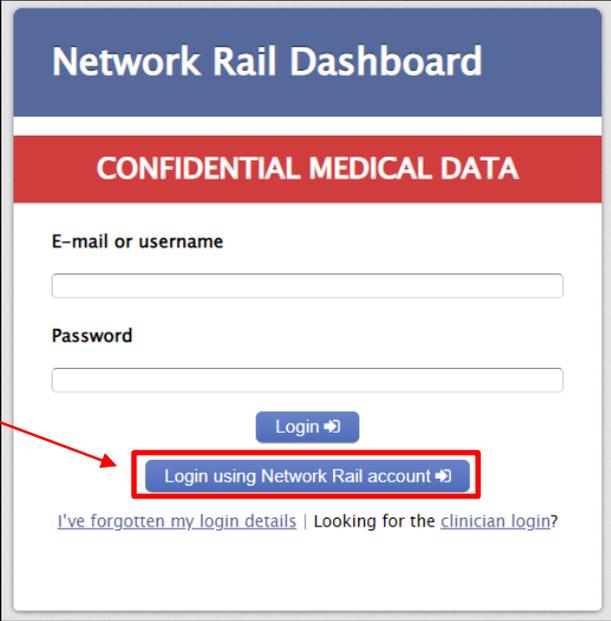
Before you start, make sure you are in a private space so confidential information added to the referral cannot be seen by others. Remember to always lock your device if you step away.

Network Rail users can securely access Orchid Live via the following link:

<https://networkrail.orchidlive.com/orchid/dashboard/default/sso>

If you need access Orchid Live to make a referral, and do not have access, please log a request via: [Orchid Live System Queries - Service Portal \(service-now.com\)](#)

If you log out of Orchid Live, simply click on the ‘**Login using Network Rail account**’ button to re-enter. Your Network Rail identity will give you direct access.



Network Rail Dashboard

CONFIDENTIAL MEDICAL DATA

E-mail or username

Password

Login

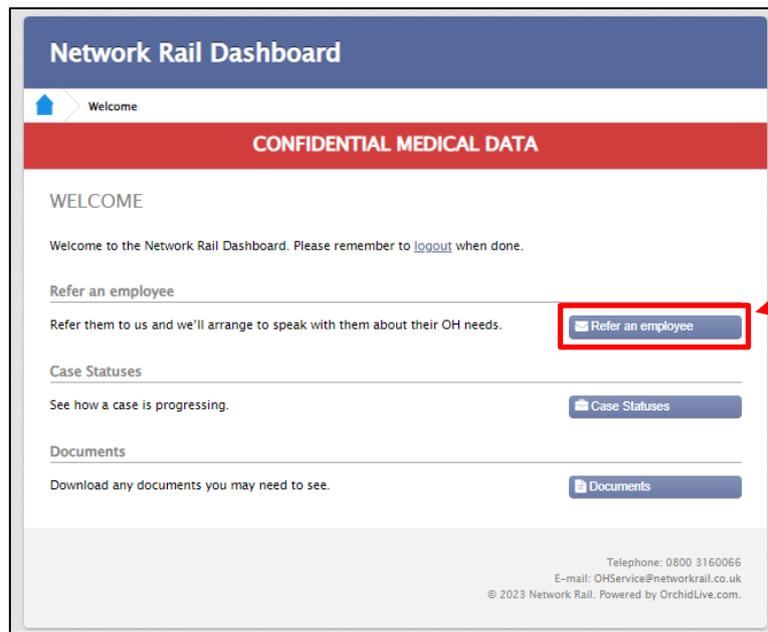
Login using Network Rail account

[I've forgotten my login details](#) | [Looking for the clinician login?](#)

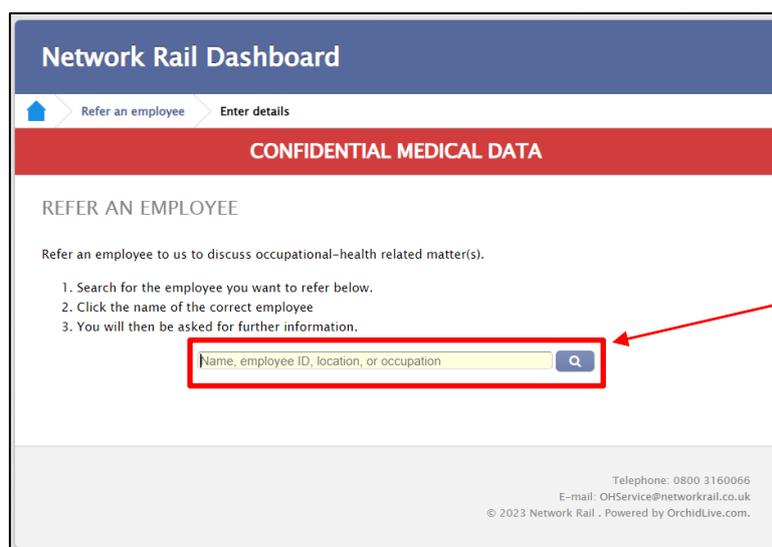
Step 2. Starting your referral for an employee:

From the menu, you can make an employee 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 will be given some further options to choose from.

Step 4. Completing the referral form:

The following sections 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 an HR or secondary contact needs to be included in the referral, e.g., for coverage of upcoming leave or support, this should be agreed with the employee and added to the referral.
- 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.

Personal	
Gender Identity:	<input type="text"/> Prefer not to say <input type="checkbox"/>
Preferred Pronouns:	<input type="text"/> Prefer not to say <input type="checkbox"/>
HR/Secondary Contact Details (optional)	
Name:	<input type="text"/>
Position:	<input type="text"/>
Email:	<input type="text"/>
Supporting Information	
Preferred centre location	<input type="text"/> ability to multi-select
Adjustments at appointment:	<input type="checkbox"/> Step free access /mobility issues <input type="checkbox"/> Chaperone or advocate <input type="checkbox"/> Accompanied by Union Representative <input type="checkbox"/> Spoken language or British Sign Language (BSL) interpreter <input type="checkbox"/> Other – please give details below
Any support notes for appointment	
<input type="text"/>	

When completing the referral, please include as much relevant information as possible. This will help make the process quicker and 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 have entered all the information needed to support the referral, carefully read the **Declaration** before confirming and submitting the referral to Occupational Health.

The form will alert you to any mandatory details that have not been completed.

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.

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.

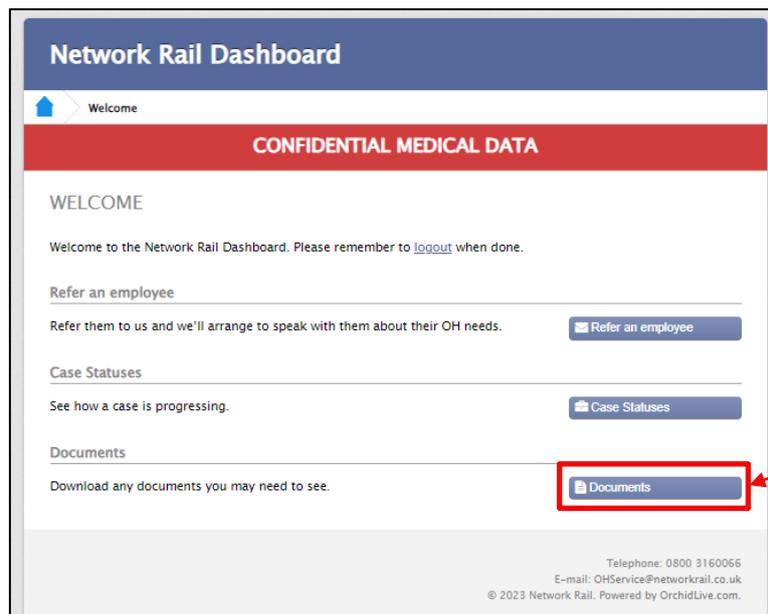
Step 6. How to view Documents in Orchid Live:

As a referrer, you can view and download documents relating to your employees' referrals that are made available to you in your Orchid Live **Referral Dashboard**.

Please log into your Orchid Live dashboard using the following link:

<https://networkrail.orchidlive.com/orchid/sso>

Select the '**Documents**' tab to view documents.



Referrers who are permanent Network Rail employees have access to both Orchid Live **Employee Dashboard** and **Referral Dashboard**. If you wish to access your own documents and reports that have been shared with you following an Occupational Health referral or assessment, please select the '**Employee Dashboard**' option in the top right of the window.



Select **'Documents'** to view your documents.

If you wish to exit, select your name in the top right corner of the window, and select **'Exit'** from the dropdown menu to return to your **Referral Dashboard**.

