

## Inputting an Occupational Health Referral and Producing the Referral Form

If an employee is off sick for the following reasons Back Neck Problems, Other Musculo Skeletal or Stress Depression Anxiety Mental Health Fatigue then they should be referred to Occupational Health straight away.

If an employee is on long term sick or is about to go onto long term sick they should also have a referral to occupational health.

**The referral itself must be done by completing the referral form and this must be emailed separately through to Occupational Health ([occupational.health@denbighshire.gov.uk](mailto:occupational.health@denbighshire.gov.uk)), this is not done via iTrent. Only the date the referral was made is to be logged in iTrent under the stages folder against the sickness absence.**

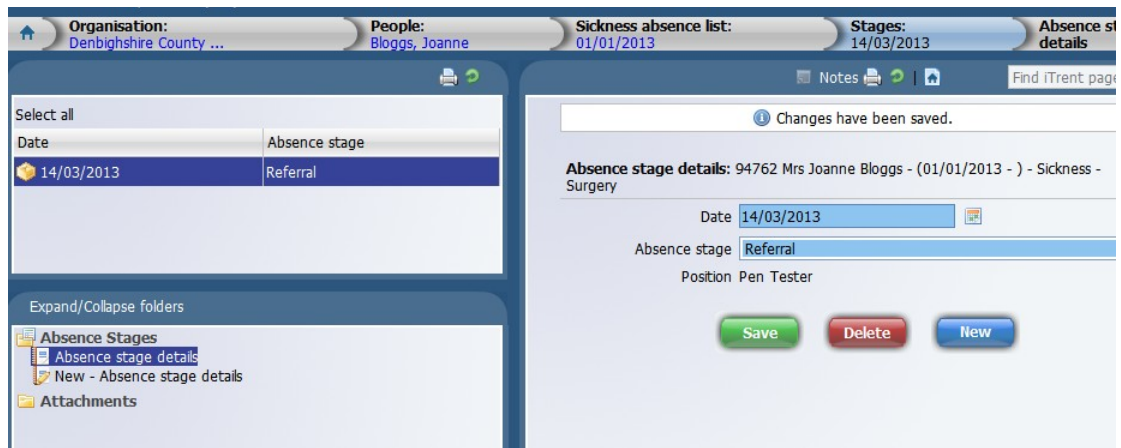
The referral form can be produced from iTrent or it can be found on the intranet on the Occupation Health page.

### Entering the Referral:

To enter an Occupational Health Referral into iTrent you will need to:

- Select Organisation Structure folder
- Select People folder (Select a person from the search box)
- Select the Absence folder
- Select Sickness Absence List
- Select the relevant sickness details in the top left hand box
- Select the Stages folder
- Select New – Absence stage details
- Enter in the date of the Referral into the Stage Date field
- Enter Referral in the Stage field using the drop down option
- Select the Save button

The screenshot shows the iTrent interface for entering an Occupational Health Referral. The top navigation bar includes 'Organisation: denbighshire County ...', 'People: Bloggs, Joanne', 'Sickness absence list: 01/01/2013', and 'Stages New - Absence stage details'. The main content area is titled 'Absence stage details: New' and contains a 'Date' field with the value '14/03/2013' and an 'Absence stage' dropdown menu. The dropdown menu is open, displaying a list of options. A red arrow points to the 'Referral' option in the list. The left sidebar shows a navigation tree with 'Absence stage details' selected.



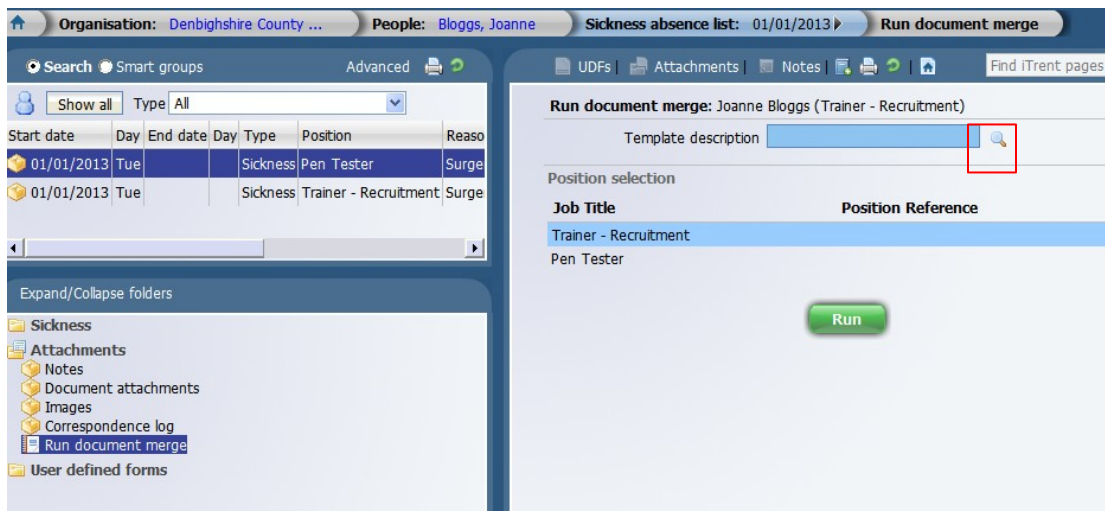
## To Generate the Occupational Health Referral Form after entering a sickness

To able the occupational health referral form you will need to:

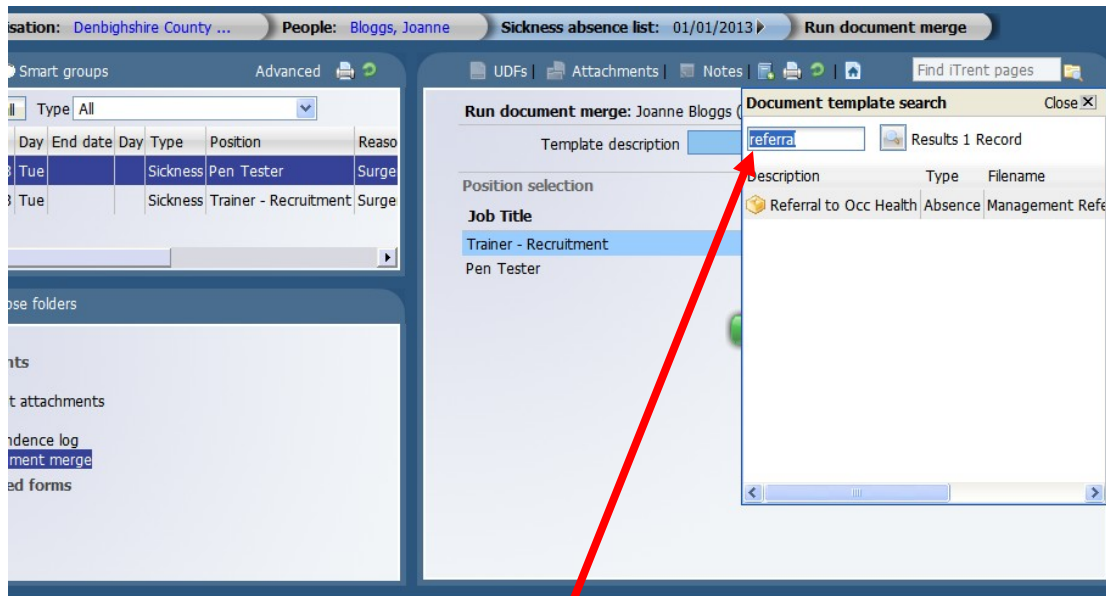
- Click back to the Sickness Absence List on your navigation tool bar



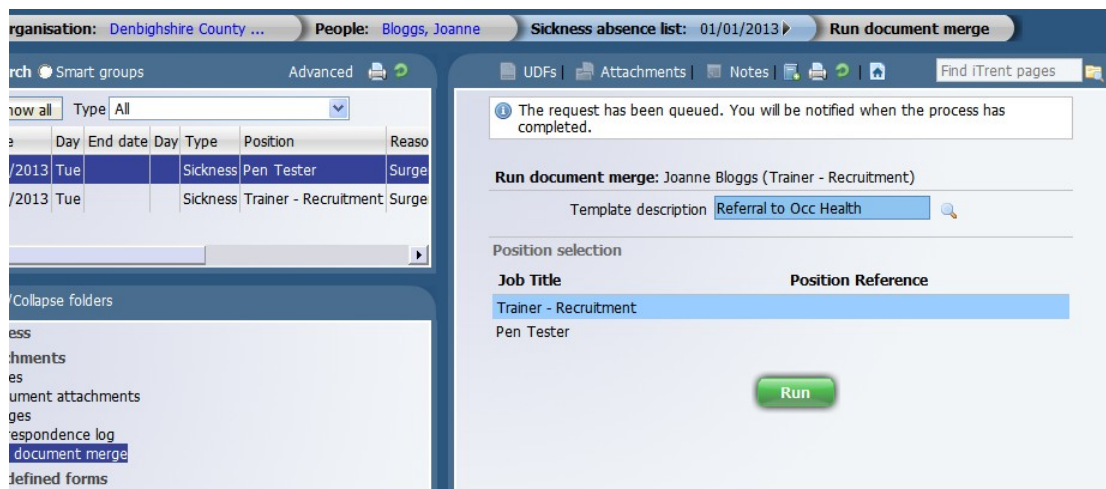
- Select the relevant sickness details in the top left hand box
- Select the Attachments folder (you may need to scroll down in the bottom left hand box)
- Select Run Document Merge



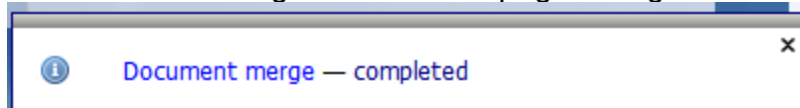
- Select the magnifying glass icon next to the Template description box.




- Once the search box is displayed type in the word Referral and click the magnifying glass icon
- Select the Referral to Occ Health option (the box will close)
- Select the Run icon and you will see a message to tell you that the request is being processed



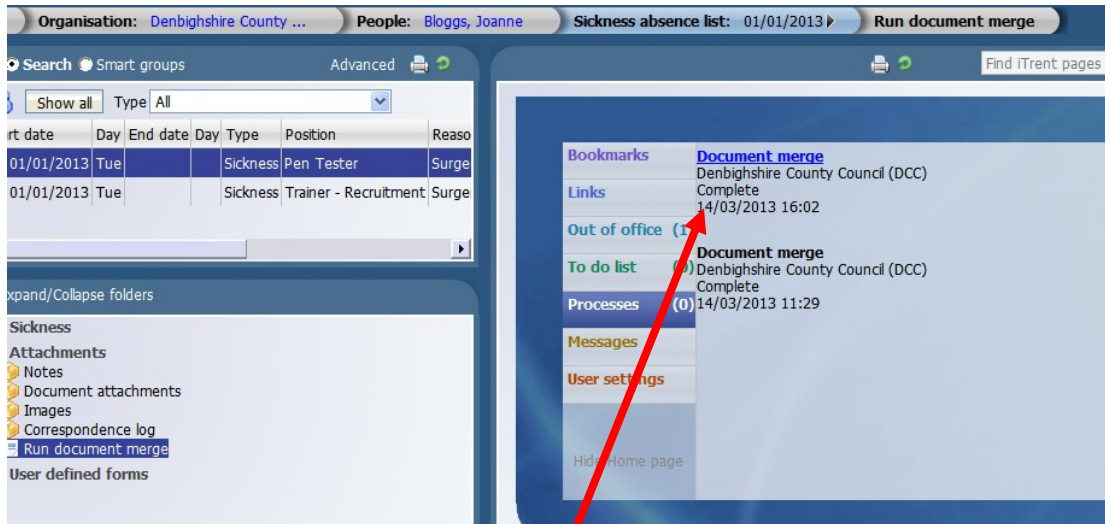
- Once the form has been generated you should have a pop up box appear on your screen which you can select by clicking on the wording and it will then bring the download page through



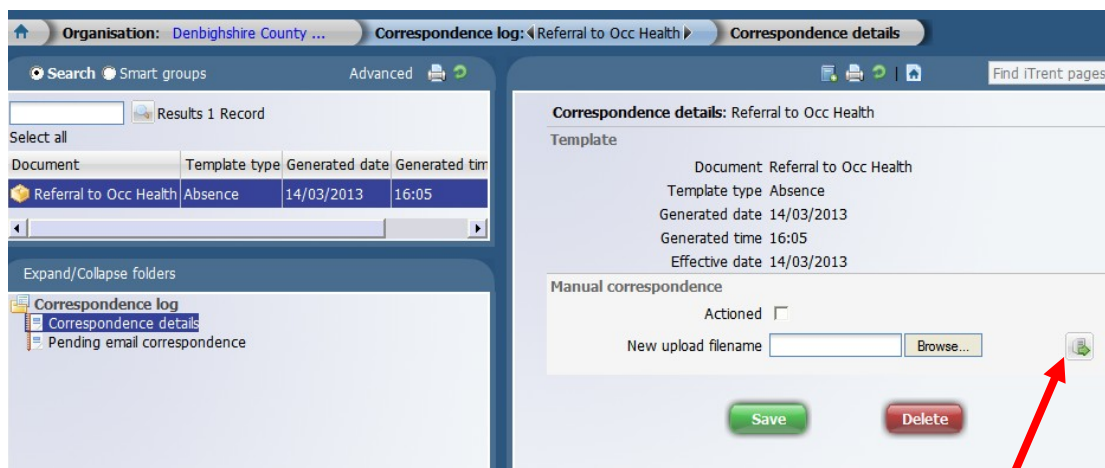
- Or you can navigate to your homepage within iTrent to select the document. To navigate to your homepage, click on the  icon on your navigation toolbar




- Select the Process folder on your homepage



- Select the Document Merge by clicking on the wording and it will open a new tab which will display the download page



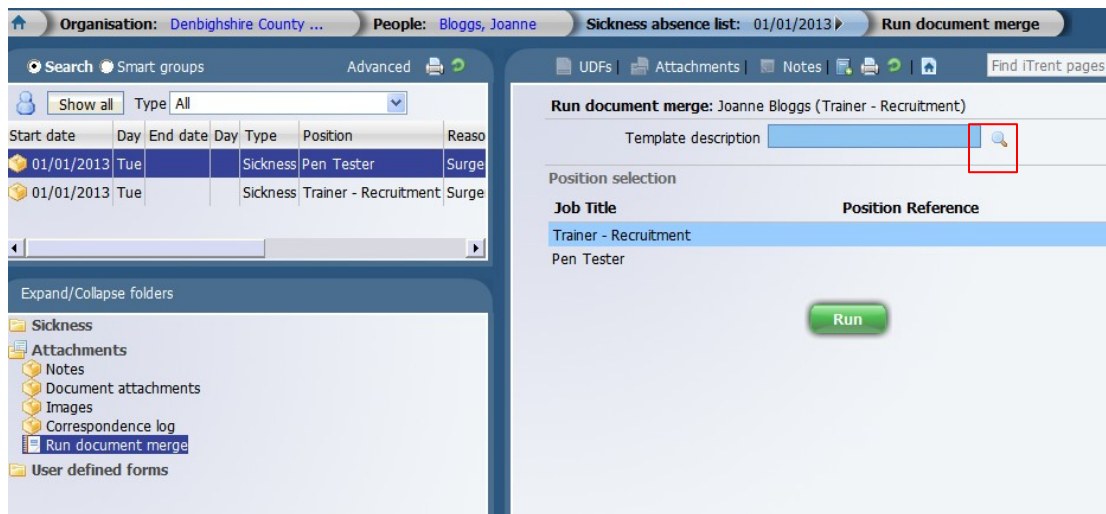
- Select the download icon  to open the form. The system will ask if you want to Open or Save the document.
- The form will open into a Microsoft Word document for you to complete
- Complete any sections of the form that are blank and require information
- Save the form on your network drive
- Email a copy of the form to Occupational Health at [occupational.health@denbighshire.gov.uk](mailto:occupational.health@denbighshire.gov.uk)

### To Generate the Occupational Health Referral Form – From first logging into iTrent People Manager

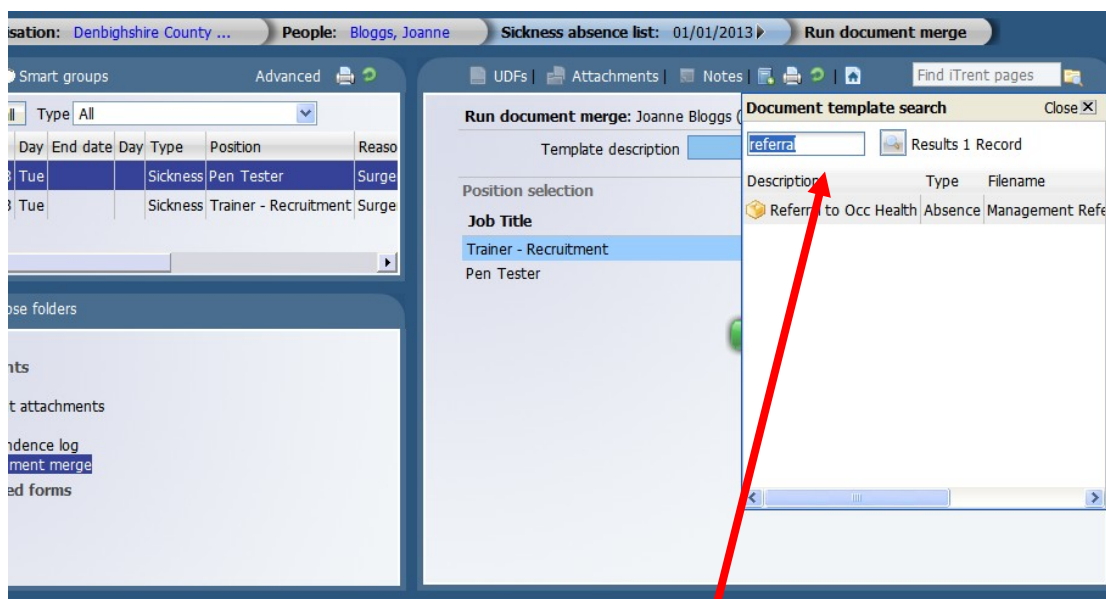
To able the occupational health referral form you will need to:

- Select Organisation Structure folder
- Select People folder (Select a person from the search box)
- Select the Absence folder
- Select Sickness Absence List

- Select the relevant sickness details in the top left hand box
- Select the Attachments folder (you may need to scroll down in the bottom left hand box)
- Select Run Document Merge

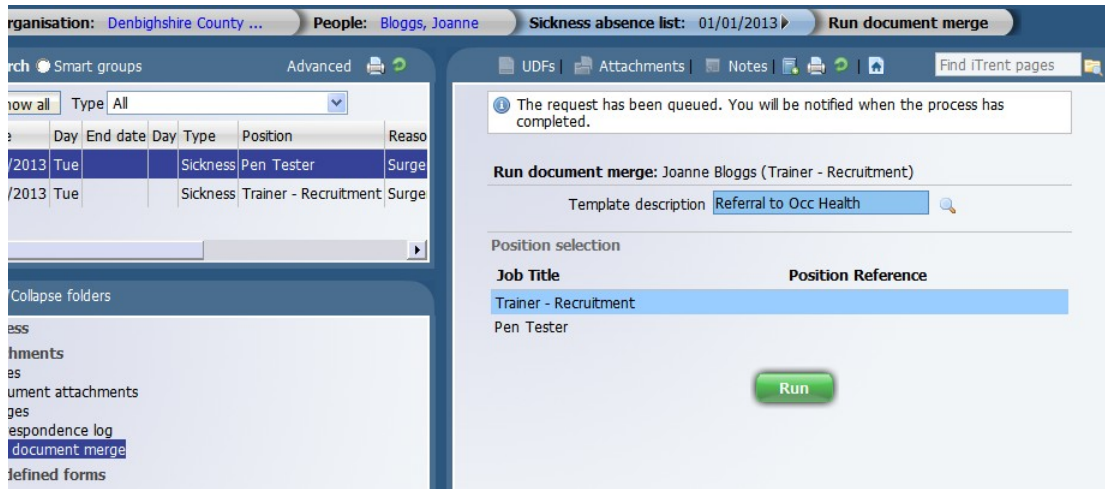


- Select the magnifying glass icon next to the Template description box.

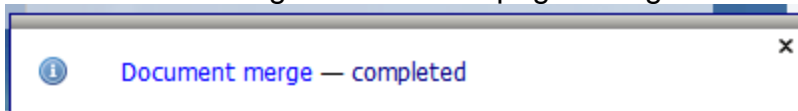



- Once the search box is displayed type in the word Referral and click the magnifying glass icon
- Select the Referral to Occ Health option (the box will close)
- Select the Run icon and you will see a message to tell you that the request is being processed





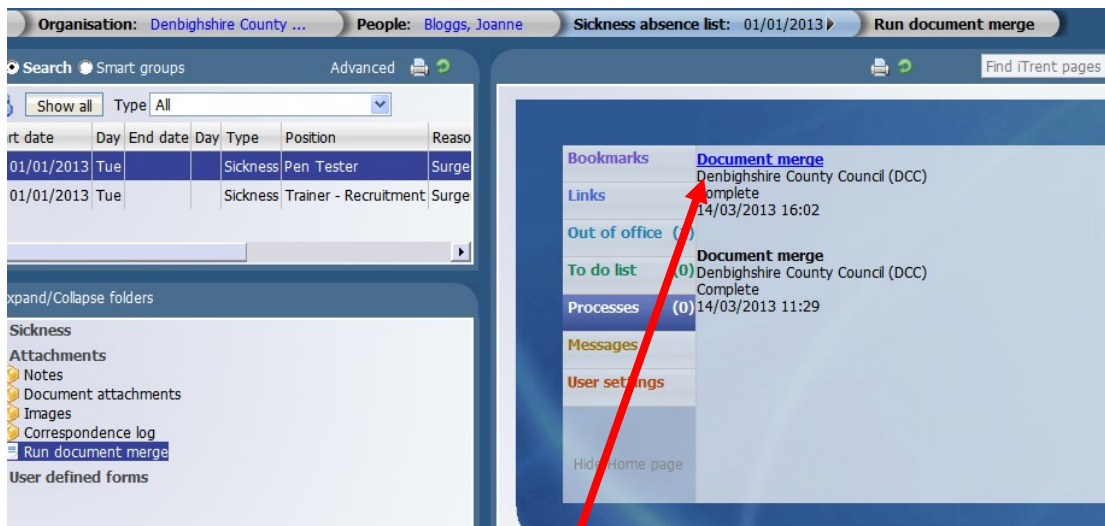
- Once the form has been generated you should have a pop up box appear on your screen which you can select by clicking on the wording and it will then bring the download page through



- Or you can navigate to your homepage within iTrent to select the document. To navigate to your homepage, click on the  icon on your navigation toolbar





- Select the Process folder on your homepage




- Select the Document Merge by clicking on the wording and it will open a new tab which will display the download page

Organisation: Denbighshire County ... Correspondence log: Referral to Occ Health Correspondence details

Search Smart groups Advanced   Find iTrent pages

Select all Results 1 Record

Document	Template type	Generated date	Generated time
 Referral to Occ Health	Absence	14/03/2013	16:05

Expand/Collapse folders

- Correspondence log
  - Correspondence details
  - Pending email correspondence


**Correspondence details: Referral to Occ Health**


Template

Document: Referral to Occ Health  
 Template type: Absence  
 Generated date: 14/03/2013  
 Generated time: 16:05  
 Effective date: 14/03/2013

Manual correspondence

Actioned

New upload filename   

- Select the download icon  to open the form. The system will ask if you want to Open or Save the document.
- The form will open into a Microsoft Word document for you to complete
- Complete any sections of the form that are blank and require information
- Save the form on your network drive
- Email a copy of the form to Occupational Health at [occupational.health@denbighshire.gov.uk](mailto:occupational.health@denbighshire.gov.uk)