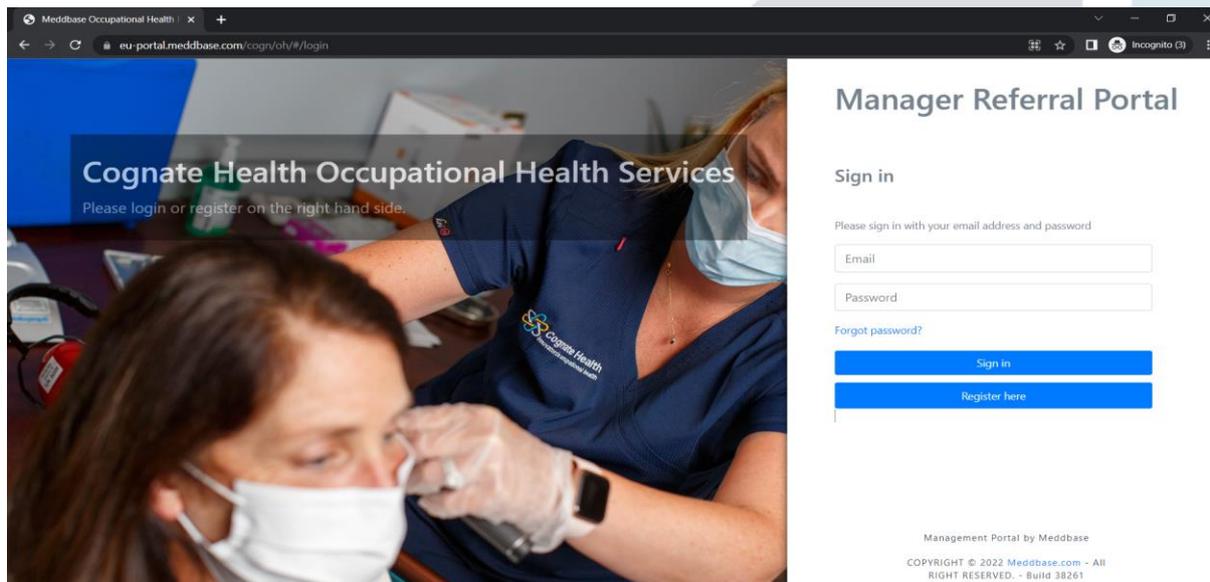


Meddbase Health Declaration Procedure – Client/Recruitment

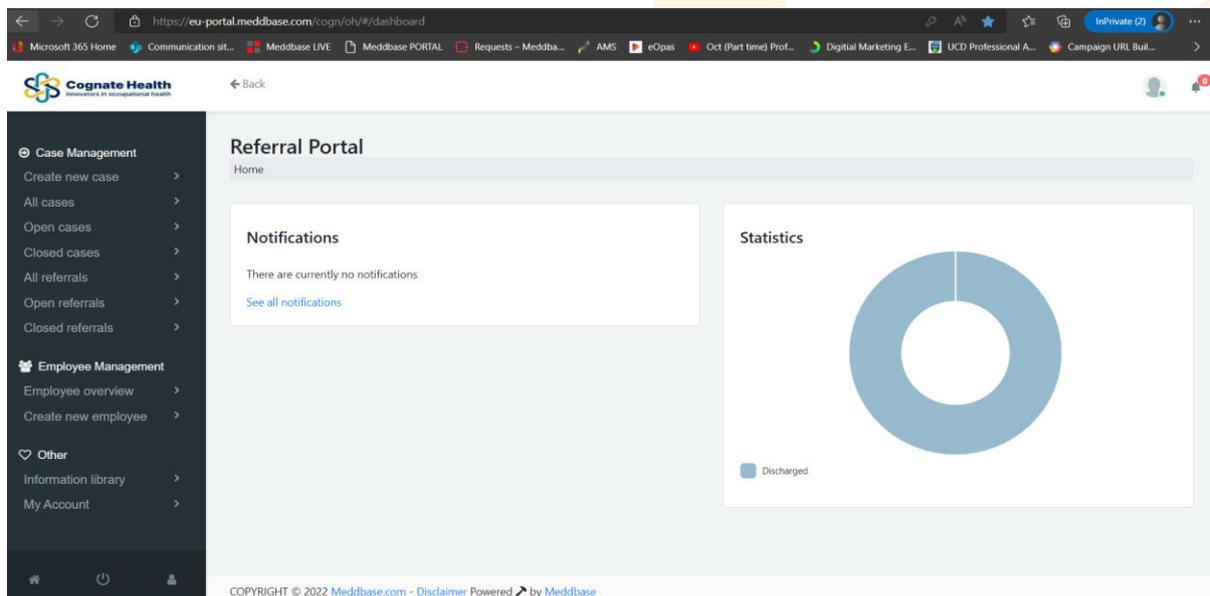
How to make a Health Declaration Referral via your portal dashboard

Log in to [Meddbase Online Portal](#) and save it as a favourite on your preferred internet browser using the email and personal password you set earlier.



You will land on your dashboard.

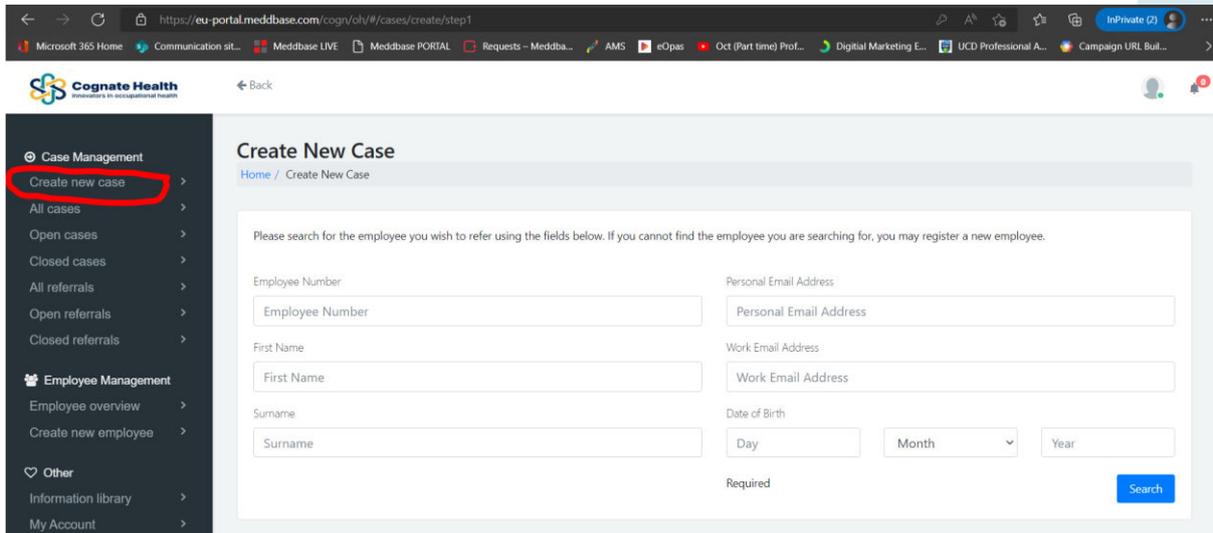
Use the menu down the left hand side to navigate through your portal.



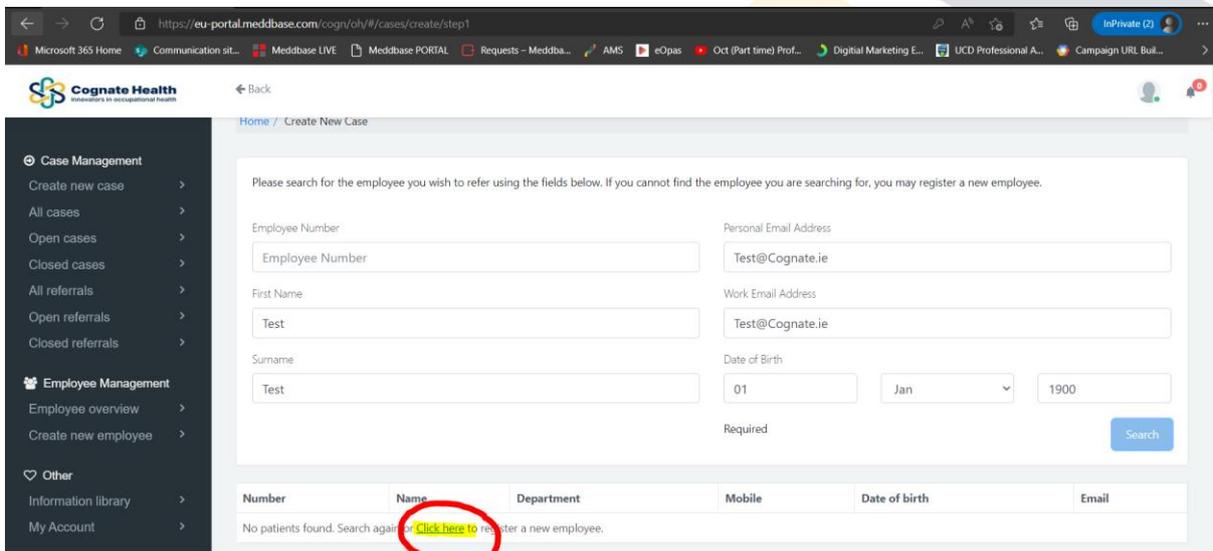
“Create a new case” to make a referral for a Health Declaration Questionnaire (left hand side menu).

Create a new employee by adding some employee details and clicking the Search Button (blue).

If your employee is registered on the system already, select the name and details shown below the search box.



If your employee is not registered, use the [Click Here](#) button (highlighted) to register.



Number	Name	Department	Mobile	Date of birth	Email
No patients found. Search again or Click here to register a new employee.					

Please ensure you complete all relevant fields.

Ensure all fields marked below with a red dot are fully populated. Click Create New Employee Button (blue).

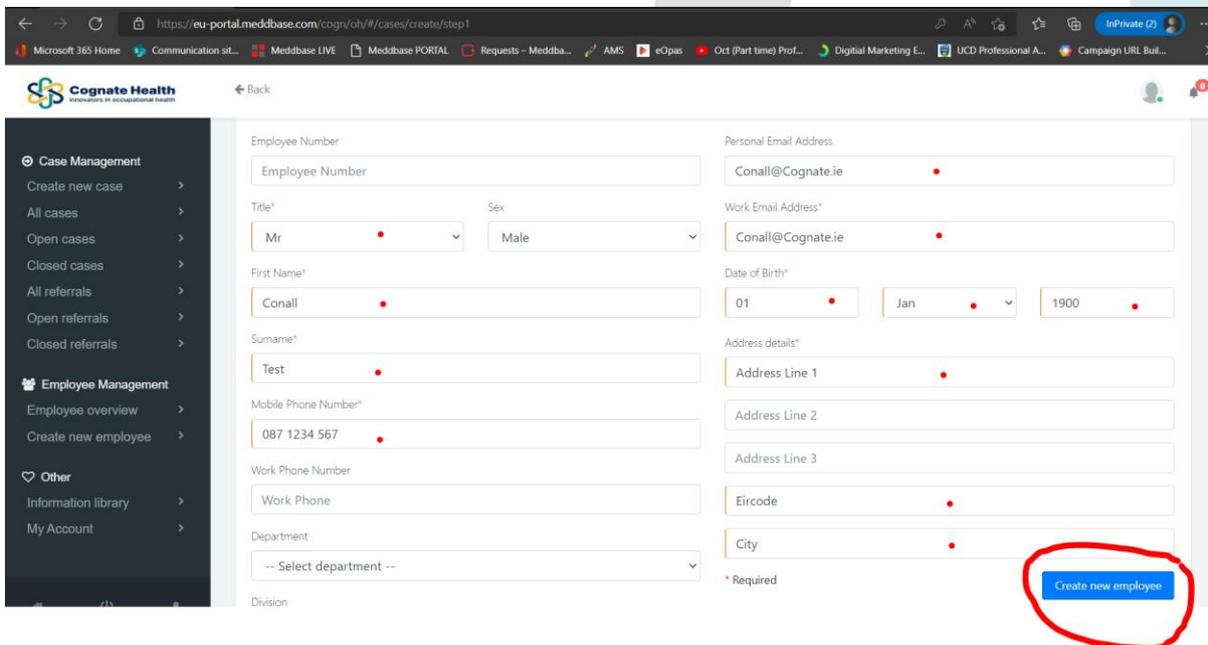
NOTE:

Both Personal email and Work email fields **must** be populated – the same email can be used in both fields if only one email address is available.

An email will be generated automatically and sent to your employee's **Work** email address to confirm all appointment details.

Any forms required for the consultation (Pre-Employment Questionnaire, Assessment Consent Form) will be sent automatically to your employee's **Personal** email address.

If only 1 email is available, please enter it in both Personal and Work email fields.



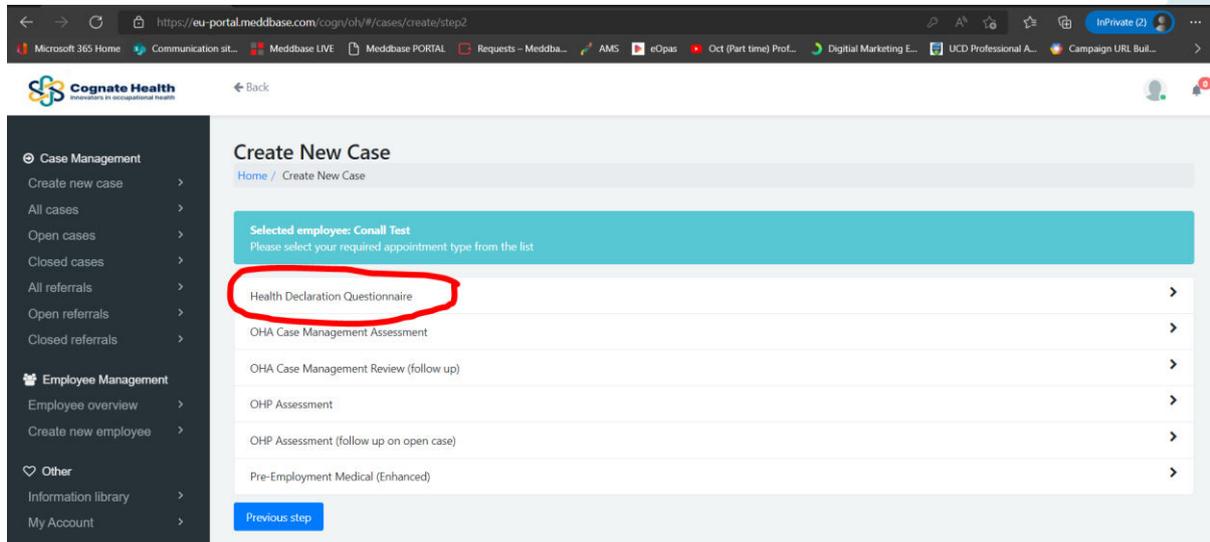
The screenshot shows a web browser window displaying the Cognate Health employee creation form. The browser address bar shows the URL: <https://eu-portal.meddbase.com/cogn/oh/#/cases/create/step1>. The form is titled "Create new employee" and is divided into several sections. On the left, there is a navigation menu with options like "Case Management", "Employee Management", and "Other". The main form area contains the following fields:

- Employee Number:
- Title*: (with a red dot)
- Sex:
- First Name*: (with a red dot)
- Surname*: (with a red dot)
- Mobile Phone Number*: (with a red dot)
- Work Phone Number:
- Department:
- Division:
- Personal Email Address: (with a red dot)
- Work Email Address*: (with a red dot)
- Date of Birth*: (with a red dot), (with a red dot), (with a red dot)
- Address details*: (with a red dot), , , (with a red dot), (with a red dot)

At the bottom right of the form, there is a blue button labeled "Create new employee", which is circled in red. Below the form, there is a note: "* Required".

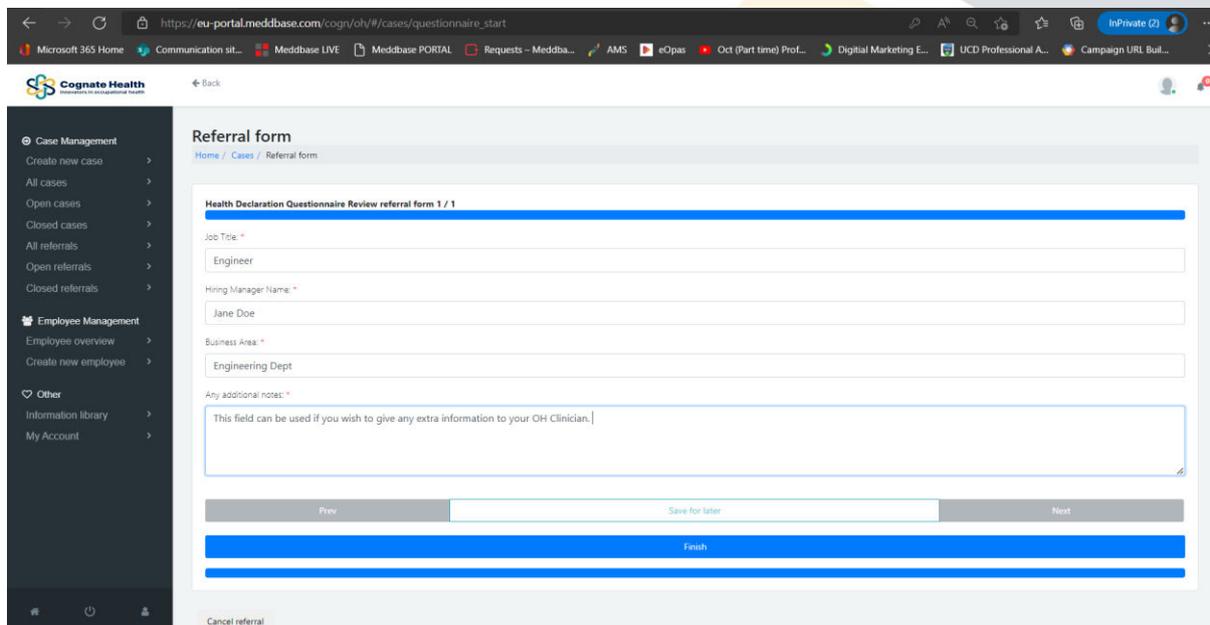
Your contracted services will be listed here.

Pick the service for which you wish to refer your employee to Cognate Health. In this case, Health Declaration Questionnaire.



You are now in the Health Declaration Questionnaire referral form, follow the steps to complete and submit.

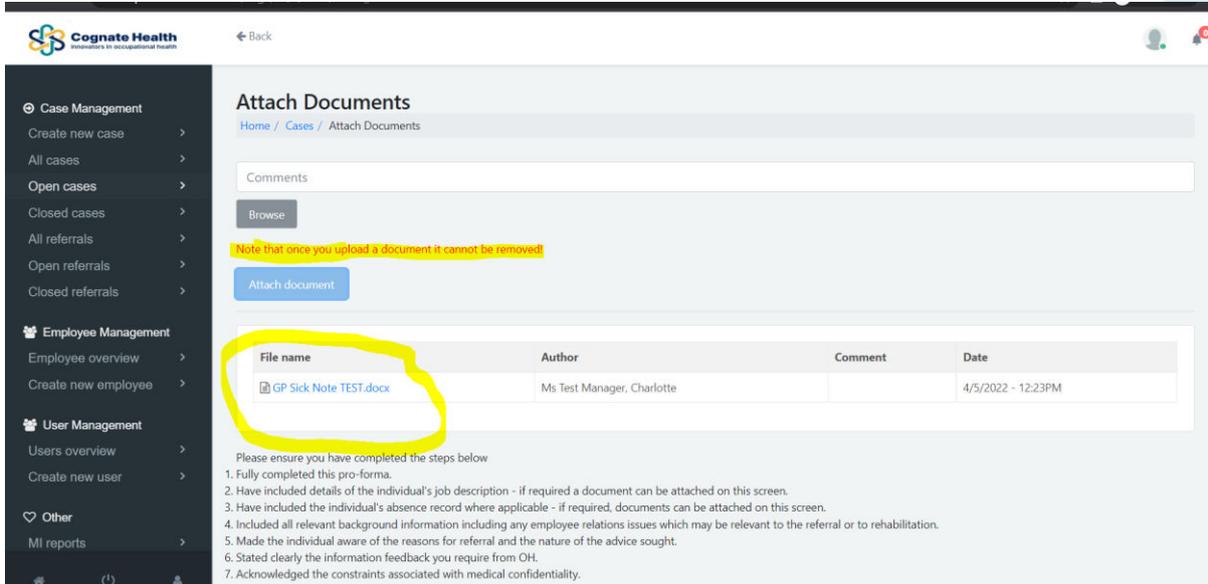
Click on FINISH button to create your referral.



Health Declaration Questionnaire Referral Form (pg 1/1)

You can easily attach any extra documents here by browsing your own documents library. Relevant document types are Job Description, Supplementary Reports, IH Reports etc.

Once uploaded, click on *“Attach Document”* button (blue). Your attachment will now appear in the box below (highlighted).

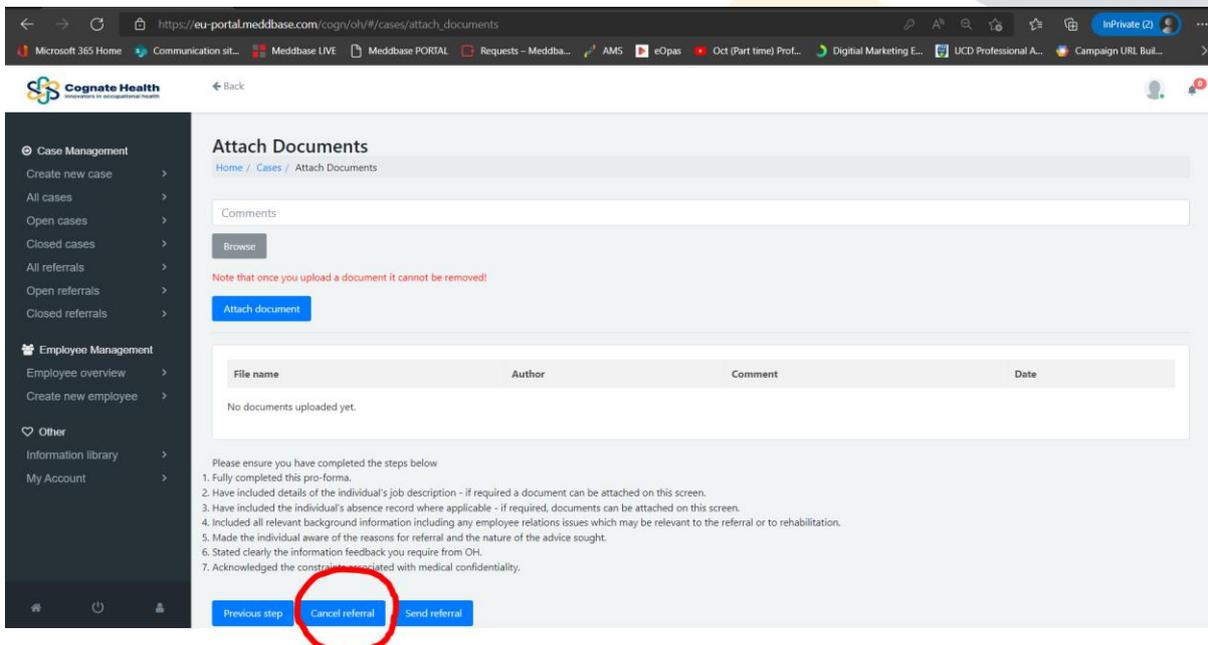


The screenshot shows the 'Attach Documents' interface. A table lists the uploaded document:

File name	Author	Comment	Date
GP Sick Note TEST.docx	Ms Test Manager, Charlotte		4/5/2022 - 12:23PM

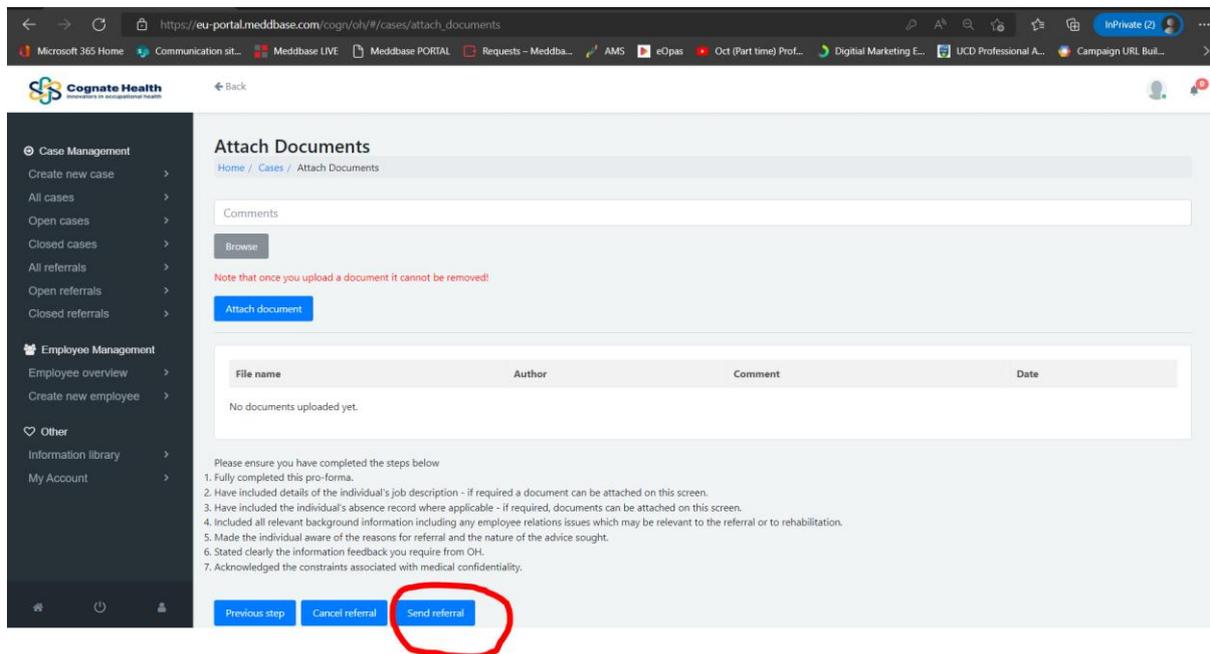
The 'Attach document' button is highlighted in blue. A yellow circle highlights the document entry in the table.

You can cancel your referral at any time before you submit it, should you wish to do so. There is a *“Cancel Referral”* option at the bottom of each page of the referral form.



The screenshot shows the 'Attach Documents' interface with no documents uploaded. At the bottom, the 'Cancel referral' button is circled in red.

Once you have finished completing the Health Declaration Referral Form click on “Send Referral” button at the bottom of the screen to submit it to your Occupational Health Department.



Attach Documents

Home / Cases / Attach Documents

Comments

Browse

Note that once you upload a document it cannot be removed!

Attach document

File name	Author	Comment	Date
No documents uploaded yet.			

Please ensure you have completed the steps below

1. Fully completed this pro-forma.
2. Have included details of the individual's job description - if required a document can be attached on this screen.
3. Have included the individual's absence record where applicable - if required, documents can be attached on this screen.
4. Included all relevant background information including any employee relations issues which may be relevant to the referral or to rehabilitation.
5. Made the individual aware of the reasons for referral and the nature of the advice sought.
6. Stated clearly the information feedback you require from OH.
7. Acknowledged the constraints associated with medical confidentiality.

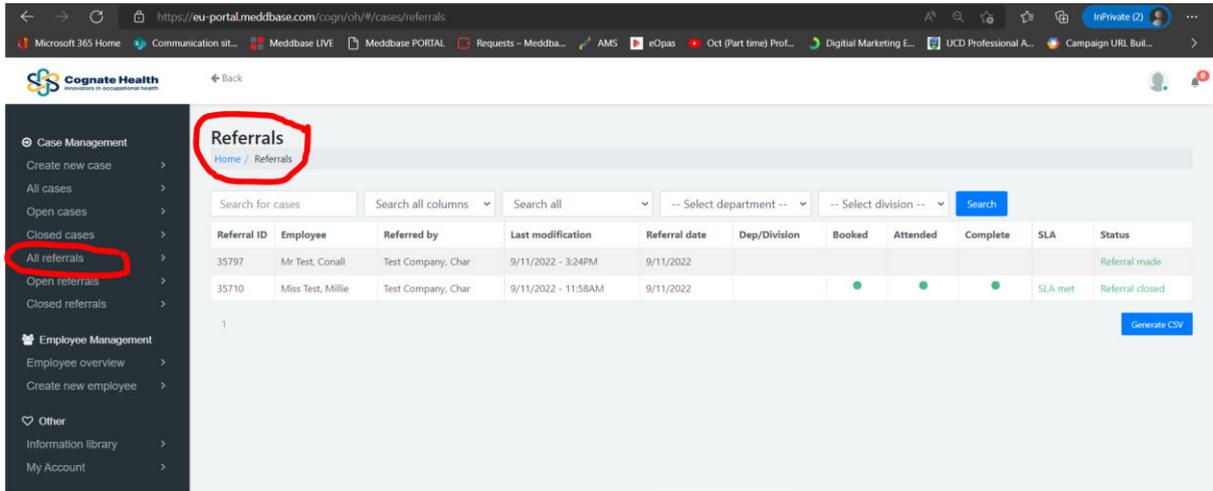
Previous step Cancel referral **Send referral**

NOTE:

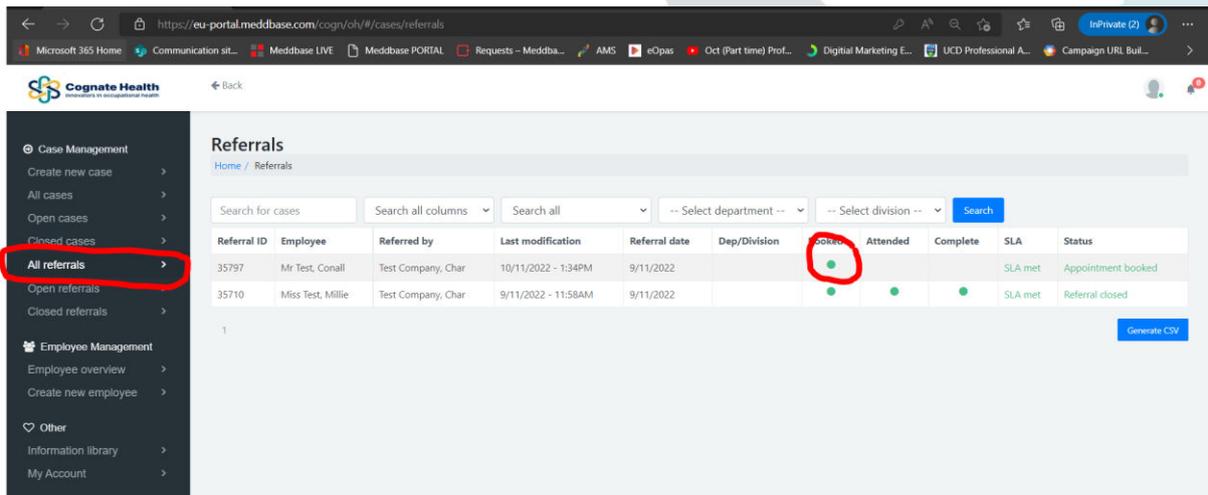
Once your referral has been accepted by your OH Department, an appointment will be scheduled 48/72 hours forward. This action will allow the following:

- Send an email to your new employee outlining the process they are required to follow.
- Send a secure email to your new employee containing a link to the Health Declaration Questionnaire and instructions to complete same.
- Allow your new employee to complete the questionnaire and submit it electronically within a secure system.
- Post appointment notification to the referring managers portal under “All Referrals” menu.

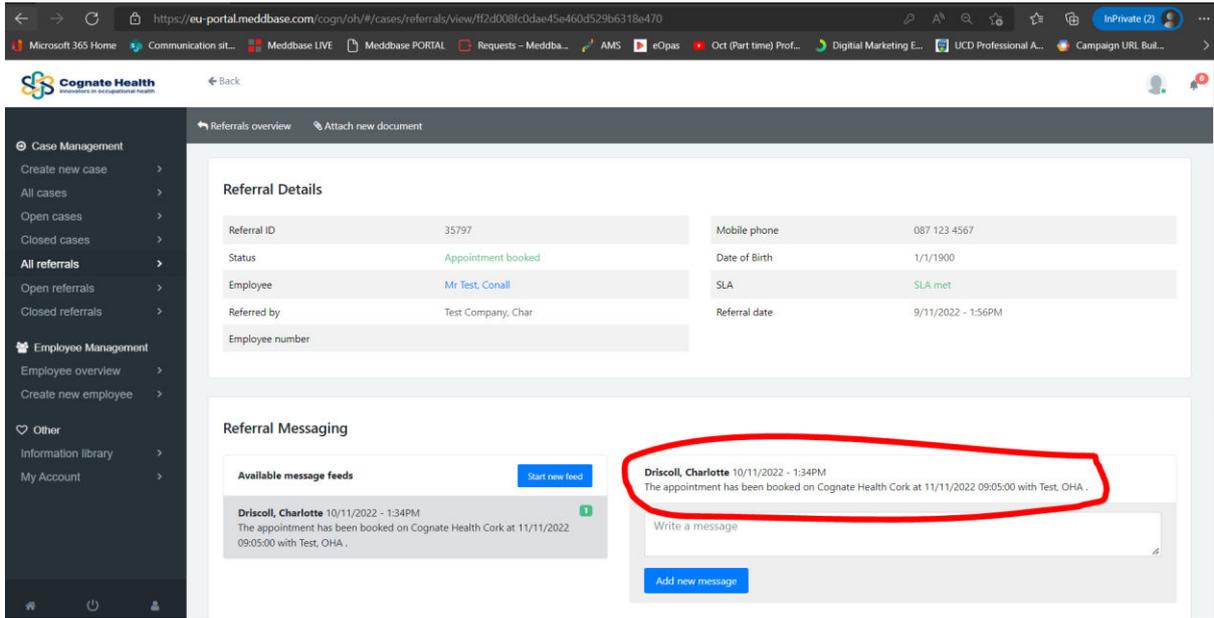
You can track the progress of your referral via “All Referrals” menu option on the left-hand side.



Use the left-hand menu to review your referrals. You can review the progress of all your referrals here. In this example you can see that an appointment has been actioned/booked.



All Referrals Menu – Appointment Booked



Referral Details

Referral ID	35797	Mobile phone	087 123 4567
Status	Appointment booked	Date of Birth	1/1/1900
Employee	Mr Test, Conall	SLA	SLA met
Referred by	Test Company, Char	Referral date	9/11/2022 - 1:56PM
Employee number			

Referral Messaging

Available message feeds [Start new feed](#)

Driscoll, Charlotte 10/11/2022 - 1:34PM
The appointment has been booked on Cognate Health Cork at 11/11/2022 09:05:00 with Test, OHA .

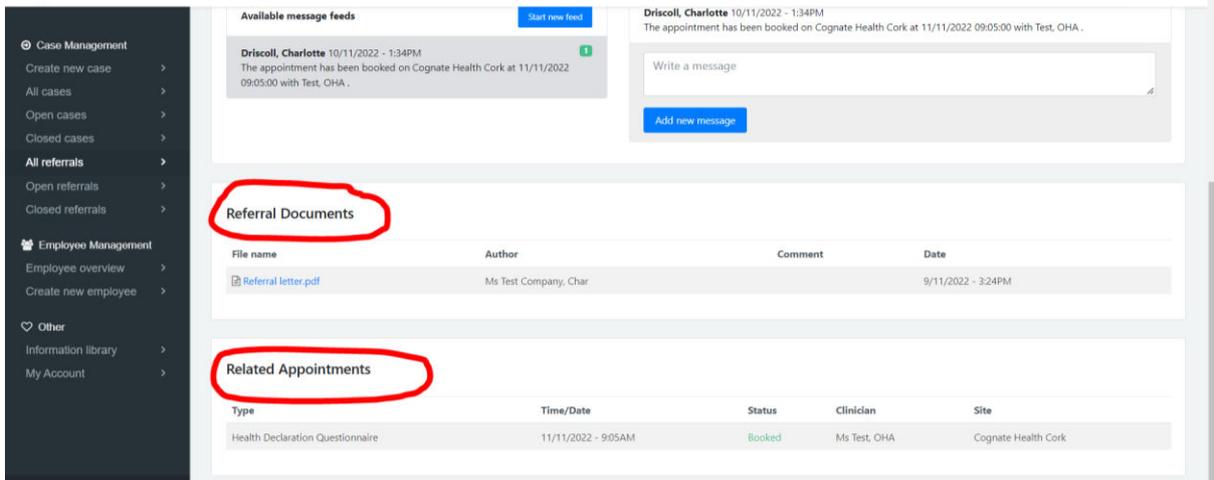
Driscoll, Charlotte 10/11/2022 - 1:34PM
The appointment has been booked on Cognate Health Cork at 11/11/2022 09:05:00 with Test, OHA .

Write a message

[Add new message](#)

Appointment Notification (pg 1/2)

You can view your referral letter and appointment details in this page.



Available message feeds [Start new feed](#)

Driscoll, Charlotte 10/11/2022 - 1:34PM
The appointment has been booked on Cognate Health Cork at 11/11/2022 09:05:00 with Test, OHA .

Write a message

[Add new message](#)

Referral Documents

File name	Author	Comment	Date
Referral letter.pdf	Ms Test Company, Char		9/11/2022 - 3:24PM

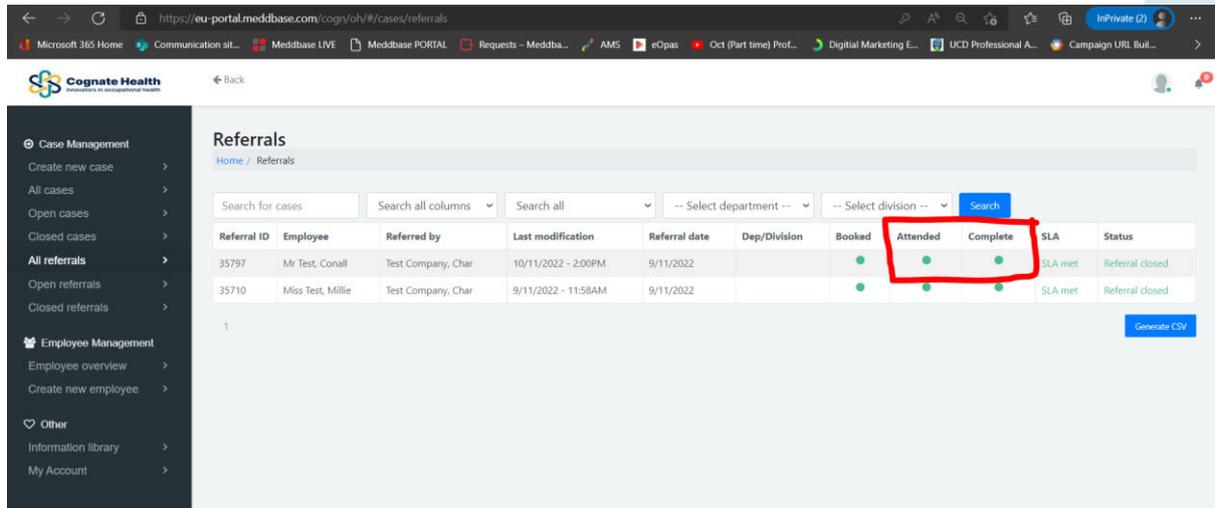
Related Appointments

Type	Time/Date	Status	Clinician	Site
Health Declaration Questionnaire	11/11/2022 - 9:05AM	Booked	Ms Test, OHA	Cognate Health Cork

Appointment Notification (pg 2/2)

Accessing your report

Once the Health Declaration Questionnaire review appointment has been completed, a fitness certificate will be issued back to the referring manager, via the portal. In this example you can see that the appointment has been completed and your report is available for you on your portal account.

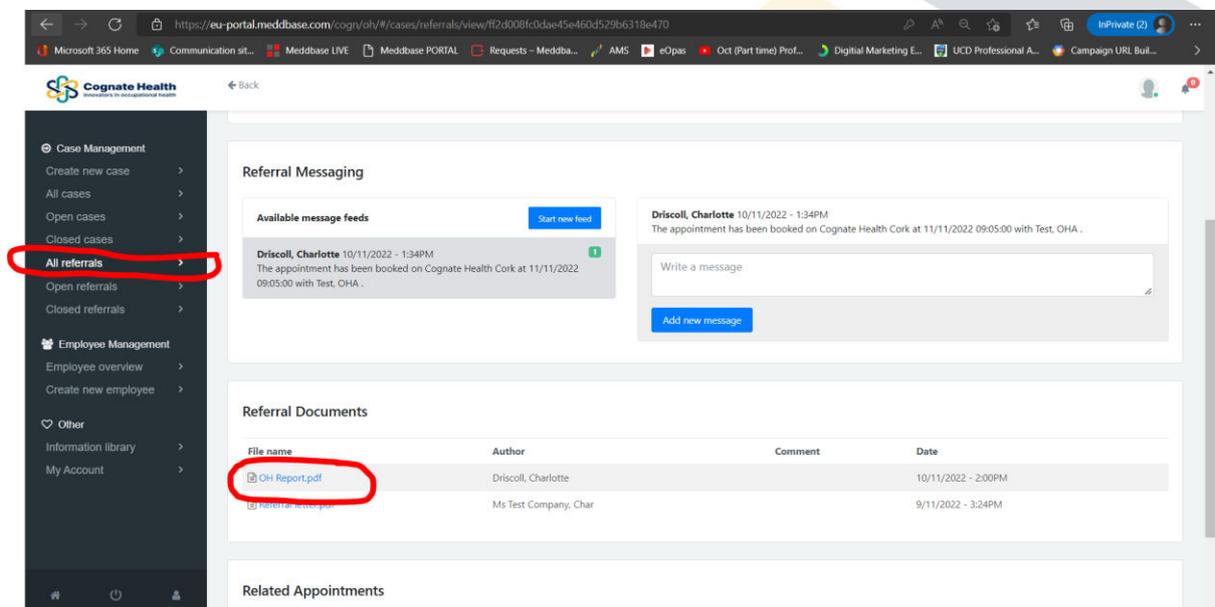


The screenshot shows the 'Referrals' page in the Cognate Health portal. A table lists two referrals. The 'Attended' and 'Complete' columns for both referrals are highlighted with a red box, indicating that the appointment has been completed.

Referral ID	Employee	Referred by	Last modification	Referral date	Dep/Division	Booked	Attended	Complete	SLA	Status
35797	Mr Test, Conall	Test Company, Char	10/11/2022 - 2:00PM	9/11/2022		●	●	●	SLA met	Referral closed
35710	Miss Test, Millie	Test Company, Char	9/11/2022 - 11:58AM	9/11/2022		●	●	●	SLA met	Referral closed

Click on the relevant line to open that referral.

Click on blue links to access your documents.



The screenshot shows the 'Referral Messaging' and 'Referral Documents' sections. In the 'Referral Documents' section, a table lists documents. The 'OH Report.pdf' document is circled in red, indicating it is the report mentioned in the text.

File name	Author	Comment	Date
OH Report.pdf	Driscoll, Charlotte		10/11/2022 - 2:00PM
OH Referral.docx.pdf	Ms Test Company, Char		9/11/2022 - 3:24PM

Once you click on the blue link from the last step, your report will open in a new browser tab.

Your report will remain on the portal for you to access any time. Alternatively, you can download or print the report (top right hand corner) to save it to your own document library.

