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Please click on the topic you wish to know more about; this will bring you directly to the page.



Logging Into the Meddbase Portal

Log in to <u>https://eu-portal.meddbase.com/cogn/oh/#/login</u> and save it as a favourite on your preferred internet browser.



You will land on your dashboard.

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





Creating a Case

"Create a new case" to make a referral (left hand side menu).

Search for an employee by adding some employee details and clicking the Search Button (blue).

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

Cognate Heal	th	← Back						9.	e
 Case Management Create new case 	>	Create I Home / Crea	New Case						
All cases Open cases	> >	Please sear	ch for the employee you wish to re	fer using the fields below. If y	ou cannot find the	employee you are :	searching for, you may register a new employee.		
Closed cases All referrals	> >	Employee N	lumber			Personal Email Ad	dress		
Open referrals	>	Employ	ee Number			Personal Email Address			
Closed referrals	>	First Name				Work Email Address			
😁 Employee Managemer	nt	First Na	me			Work Email A	ddress		
	>	Surname				Date of Birth			
Create new employee	>	Surname				Day	Month Year		
嶜 User Management	1953					Required	T	Search	1
Users overview Create new user	> >						Ľ		J
♡ Other		Number	Name	Department	Mobile	Date of birth	Email		
MI reports	>	12345.com	Car Test Test Tes		087 624 3983	1/1/1900	c@gmail.com, c@gmail.com		
			Caroline Test Test Patient	Clerical Department	+35312345	1/1/1900	c@hotmail.com, c@hotmail.com		
		TEST	Charlotte Test		097 941 2703	1/1/1900	charlotte@connatehealth.ie.charlotte@connatehealth.ie		

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

me / create new c	Jase							
lease search for the	e employee you wish to r	efer using the fields below. If you ca	nnot find the employee you are s	earching for, you may register a ne	w employee.			
mplovee Number			Personal Email Add	Ineos				
987			testportal@cc	gnatehealth.ie				
First Name			Work Email Addres	Work Email Address				
Test Portal			testportal@co	testportal@cognaehealth.ie				
umame			Date of Birth					
Charlotte			01	Jan	✓ 190	00		
			Required			Search		
mber	Name	Department	Mobile	Date of birth		Email		

Please ensure you complete all relevant fields.



Adding a New Employee to your Dashboard

Please ensure all fields are filled out fully and correctly for the employee you wish to refer.

Please note all correspondence will be **sent to the email address populated in the personal email** address field. – If you do not have a personal email, please input the work email twice, and vice versa if you do not have a work email for the employee.

If you do not have the employee's Eircode, '0000' will suffice.

If you do not have the employee's DOB, 01/01/1900 can be used

:mplayee number				Personal email address			
Employee Number				millie@gmail.com			
Title*		Sex		Work email address*			
Ms	~	Female	~	millie@gmail.com			
first name*				Date of Birth*			
Mille				22	Mar	~	1977
Sumame*				Address details*			
Brown				2 Berry Crest			
Sender Identity and Pronouns				Castleowen			
Select gender	~	Select pronouns	~	Castleonon			
vlobile phone number*				FERMOY			
089 491 7854				P21 HEER			
Department				CIt			
Admin				COIK			
Division				* Required			Cont
Select division							

Mandatory Fields:

- Title
- First Name
- Surname
- Mobile number to access questionnaires a code is sent to this number, cannot be landline
- Work Email please use personal email if no work email
- DOB use work around mentioned above if no DOB
- First line of address
- Eircode use workaround mentioned above if you do not have the employee's Eircode
- City
- Personal email address please input work email here if no personal email
- Department please select the employee's department if your company has set up depts

Click the blue 'Continue' button, to proceed.



Selecting the Service for your Employee

You can then select the service you wish to book for the employee

Case Management		Create New Case	
Create new case	>	Home / Create New Case	
	>		
	>	Selected employee: Mille Brown	
	>	Please select your required appointment type from the list	
	>		
	>	OHA Case Management Assessment	
	>	OHP Assessment	
🕈 Employee Management		Pre-Employment Medical (Doctor Based)	
	>	Pre-Employment Medical (Enhanced)	
	>		
් Other		Previous step	
MI reports	>		
	\$		

- OHA Case Management Nurse based Assessment.
- OHP Assessment Dr Based Assessment.
- Pre-Employment/Health Surveillance Medical Appointments.
- Health Declaration Pre-Employment Questionnaire, no physical appointment.

The Referral Form

Case Management Create new case Create new case Cosed cases Cosed cases Createrials Copen referrals Copen referrals Copen referrals Copen referrals Copen referrals Cosed referrals Copen ref	Cognate Heal	ith +	łack		1	2.	*
Create new case Home / Cases / Referral form All cases All cases Open cases Section 1: Notes for the Referring Manager 1 / 6 Closed cases 1. Cognate Health Ltd provides an independent, confidential occupational health service on all matters relating to the effect of health on work and work on health All referrals 2. The reason for referral should be discussed with the employee in advance of the referral. The manager should indicate that s/he has discussed this referral with the employee being referred in section 7. Closed referrals 3. To ensure the occupational health consultation is beneficial for all parties it is essential that all relevant background information is provided at the time of referral. * Employee Management 4. Managers can normally expect a written report following assessment within 3 working days of the appointment	O Case Management	R	eferral form				
All cases > Open cases > Closed cases > All referrals > Open referrals > Closed referrals > Closed referrals > Berployee Management - We Employee Management - All magers can normally expect a written report following assessment writtin 3 working days of the appointment	Create new case	> ^H	me / Cases / Referral form				
Open cases > Closed cases > All referrals > Open referrals > Open referrals > Closed referrals > The reson for referral should be discussed with the employee in advance of the referral. The manager should indicate that s/he has discussed this referral with the employee being referred in section 7. Closed referrals > ** Employee Management - ** Employee Management - ** Closed referrals - ** Employee Management - ** Closed referrals - ** Employee Management -		>					
Closed cases All referrals Open referrals 1. Cognate Health Ltd provides an independent, confidential occupational health service on all matters relating to the effect of health on work and work on health Closed referrals 2. The reason for referral should be discussed with the employee in advance of the referral. The manager should indicate that s/he has discussed this referral with the employee being referred in section 7. Closed referrals 3. To ensure the occupational health consultation is beneficial for all parties it is essential that all relevant background information is provided at the time of referral. * Employee Management 4. Managers can normally expect a written report following assessment within 3 working days of the appointment	Open cases	>	Section 1: Notes for the Referring Manager 1 / 6				
All referrals 1. Cognate Health Ltd provides an independent, confidential occupational health service on all matters relating to the effect of health on work and work on health Open referrals 2. The reason for referral should be discussed with the employee in advance of the referral. The manager should indicate that s/he has discussed this referral with the employee being referred in section 7. Closed referrals 3. To ensure the occupational health consultation is beneficial for all parties it is essential that all relevant background information is provided at the time of referral. 4. Managers can normally expect a written report following assessment within 3 working days of the appointment	Closed cases						
Open referrals 2. The reason for referral should be discussed with the employee in advance of the referral. The manager should indicate that s/he has discussed this referral with the employee being referred in section 7. Closed referrals 3. To ensure the occupational health consultation is beneficial for all parties it is essential that all relevant background information is provided at the time of referral. 4. Managers can normally expect a written report following assessment written 3 working days of the appointment	All referrals	>	1. Cognate Health Ltd provides an independent, confid	dential occupational health service on all matters relating to the effect of he	alth on work and work on health		
Closed referrals 3. To ensure the occupational health consultation is beneficial for all parties it is essential that all relevant background information is provided at the time of referral. 4. Managers can normally expect a written report following assessment within 3 working days of the appointment		>	2. The reason for referral should be discussed with the in section 7	employee in advance of the referral. The manager should indicate that s/he	has discussed this referral with the employee being ref	erred	
Employee Management 4. Managers can normally expect a written report following assessment within 3 working days of the appointment		>	3. To ensure the occupational health consultation is be	meficial for all parties it is essential that all relevant background information	is provided at the time of referral.		
	醟 Employee Managemer	nt	4. Managers can normally expect a written report follo	wing assessment within 3 working days of the appointment			
Employee overview ?	Employee overview	>					
Create new employee > Prev Save for later Next	Create new employee	>	Prev	Save for later	Next		
📽 User Management	🖀 User Management						
Users overview >		> _					
Create new user	Create new user	>					
Cancel referral			Cancel referral				
♥ Other	♡ Other	1000					

Once you have selected the service, you are now in the referral form, please read carefully the notes for referring manager and press next.

Please fill out all fields and press next as you move through the form



Section 2: Employee Details 2 / 7		
Department *		
Sales		
Job Title *		
Sales Manager		
Prev	Save for later	Next
Cancel referral		

Select the box to see the dropdown menu and select the timeframe you would like your employee seen within. Click on NEXT Button.

- o Within 48 hours
- \circ Within 1 week
- Within 2 weeks
- Other* this will give you a free text box to include employee shift patterns and days they can and cannot attend

Cognate Healt	th	€ Back			9.	0
		Referral form				
Create new case	>	Home / Cases / Referral form				
	>					
	>	Section 3: Preferred Time frame of Appointment 3	/6			
	>					
		Preferred time frame for an appointment to take place."				
	>	1 Week			~	
Closed referrals	>					
📽 Employee Managemen	at.	Prev	Save for later	Next		
Employee overview	>					
Create new employee	>					
😁 User Management		Cancel referral				
	>					

Click in the box to see the dropdown menu and choose the reason for referral. Use the free text box to include any additional information you wish to add to your referral. The more information you can offer, the better.

	← Back	9. 🔺
	Referral form	
Create new case	Home / Cases / Referral form	
All cases >		
Open cases	Section 4: 4 / 6	
Closed cases		
All referrals	Reason for referral*	
Open referrals	2. Frequent short term sickness absence	~
Closed referrals	Please provide additional details *	
嶜 Employee Management	This is a free text box. Here you can add any relevant information you wish to share with the reviewing OHP as part of this referral.	
Employee overview		
Create new employee		6
😁 User Management		_
Users overview >	Prev Save for later Next	
Create new user		
♡ Other		
MI reports >	Cancel referral	



Please choose specific questions you would like to address during the consultation.

Use the free text box to add any additional/other information you feel is relevant to the consultation.

Click NEXT.

Cognate Healt	th 🗧	• Back	9.
		Section 5: Specific Advice Requested 5 / 6	
Create new case	>		
	*	Tick the Options That Are Most Appropriate for the Information That You Require*	
Open cases	>	Is there an underlying medical condition affecting this individuals performance or attendance at work?	
	>	What is a likely time frame for recovery and when would you expect a return to work?	
All referrals	>	Is further medical support or intervention suggested?	
Open referrals	*	s s/he fit to carry out their duties? If not fit outline why?	
	>	What adjustments to the work tasks or environment may help to facilitate rehabilitation or an early return to work?	
😁 Employee Managemen	t	□ Is the health problem likely to recur or affect future attendance?	
	>	Other information (please specify e.g. opportunities for job adjustment/redeployment, any outstanding disciplinary/grievance procedures);	
Create new employee	>		
👻 User Management		Please add any "Other Information" here	
	>	Flease and any other mornation here.	
	>		
♡ Other			ti.
MI reports	*	Prev Save for later Next	
<u>م</u> (۱)		Specific Advice Reaui	red screenshot

Please complete all fields.

Please note the desired location is a free text field, you can input a specific clinic, town, or county and the administrative team will do their best to book the best option for the employee.

If your company have a cognate OHA onsite, please type 'Onsite'

If your business does not use PO Numbers, please type select "*Not applicable*" if you have a PO, select '*Yes*' from the drop down and input the PO number in the '*Purchase Order Number*' field.

Referral form Home / Cases / Referral form		
Section 6: Further Details 6 / 7		
Desired Location or Remote: *		
Cork		
Preferred format for Appointment:*		
Video		~
Purchase Order Number:*		
Yes		~
Purchase Order Number: *		
PO999988881		
Prev	Save for later	Next



Please ensure you read and comply with the Declaration below. Tick the "*I declare that*" check box to confirm.

Referral form						
Home / Cases / Referral form	Home / Cases / Referal form					
Section 7 - Confirmation and Declaration 7 / 7	Section 7 - Confirmation and Declaration 7 / 7					
Confirmation that the referral was discussed with the employee*						
Yes						
DECLARATION:*						
I declare that						
All details on this form must be discussed with the employee b	eina referred, to obtain their consent prior to it beina submitted.					
The Occupational Health clinical assessment may be performed	the an Occupational Health Practitionar within the Cognate Health Natwork					
The occupational reality clinical assessment may be perioritied	a occupational reach Practicoller within the cognate reach Network.					
By completing this form, you are confirming the employee has	By completing this form, you are confirming the employee has been informed and consented to the referal process.					
Appointment details may be sent to both the referring manage	Appointment details may be sent to both the referring manager and the employee however it is the responsibility of the referring manager to ensure the employee is aware of the appointment and confirm attendance.					
The information you provide will be handled in the strictest cor	nfidence and only seen by relevant members of the Cognate Health Occupational Health team.					
By submitting this form, I confirm that I have discussed the reas	sons for and content of this referral with the employee and I will facilitate their attendance.					
Prev	Save for later	Next				
	Einish					
	FILISI					
Cancel referral						

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

Cognate Healt	Ith	← Back		2.
		Yes		
Case Management		DECLARATION:*		
	>	P I de la chert		
All cases	>	I declare that		
Open cases	>	All details on this form must be shared with the emp	loyee being referred, to obtain their consent prior to it being submitted.	
	>	The Occupational Health clinical assessment may be	performed by an Occupational Health Practitioner within the Cognate Health Netw	ork.
Il referrals	>	By completing this form, you are confirming the emp	ployee has been informed and consented to the referral process.	
pen referrals	>	Appointment details may be sent to both the referrir	ng manager and the employee however it is the responsibility of the referring mana	ger to ensure the employee is aware of the
losed referrals	>	appointment and confirm attendance.		ger to an an entry of the original of the
	-	The information you provide will be handled in the s	trictest confidence and only seen by relevant members of the Cognate Health Occu	pational Health team.
Employee Managemer	nt	By submitting this form, I confirm that I have discuss	ed the reasons for and content of this referral with the employee and I will facilitate	their attendance.
mployee overview	`		5. S	
reate new employee	>	Prev	Save for later	Next
User Management				
sers overview	>		Finish	
	>			
Other	6			
ll ronorte	~	Cancel referral		Go to next step
Millepons				

Click the **FINISH** button, if you wish to proceed. This will create the referral. *Please note you have not completed all relevant steps at this point.



Sending The Referral Form and Attaching Documents

You can easily attach any 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).

Please note that once you add a document it cannot be removed. – Please upload as PDF

Cognate Heal	th callh	€ Back				9.	P
Case Management Create new case	>	Attach Documents Home / Cases / Attach Documents					
	>	Comments					
Open cases	>	Coniments					
	>	Browse					
	>	Note that approximate dealers which it may	at he second				
Open referrals	>	Note that once you upload a document it cann	or be removed.				
	*	Attach document					
📽 Employee Managemer	nt						
	>	File name	Author	Comment	Date		
	>	GP Sick Note TEST.docx	Ms Test Manager, Charlotte		4/5/2022 - 12:23PM		
👑 User Management							
	>	Please ensure you have completed the steps be	elow				
	>	 Fully completed this pro-forma. Have included details of the individual's job de 	scription - if required a document can be attached on this :	screen.			
♡ Other		3. Have included the individual's absence record in	where applicable - if required, documents can be attached	on this screen.			
MI reports	~	 Made the individual aware of the reasons for re 	eferral and the nature of the advice sought.	rant to the referral of to rehabilitati	on.		
	4	 Stated clearly the information feedback you red Acknowledged the constraints associated with 	quire from OH. medical confidentiality.				

IMPORTANT Once you have finished completing the referral form click on "Send Referral" button at the bottom of the screen to submit it.

Cognate Healt	th	← Back				
		Comments				
 Case Management 		-				
Create new case	>	Browse				
	>	Note that once you upload a document it can	not be removed!			
	>					
	>	Attach document				
	>					
Open referrals	>	File name	Author	Comment	Date	
Closed referrals	>	GP Sick Note TEST.docx	Ms Test Manager, Charlotte		4/5/2022 - 12:23PM	
👻 Employee Managemen	t					
	>	Discourse and the store is				
Create new employee	>	1. Fully completed this pro-forma.	NEROW			
•• ·· ··		 Have included details of the individual's job d Have included the individual's absence record 	escription - if required a document can be attached on this where applicable - if required, documents can be attached	s screen. d on this screen		
User Management		4. Included all relevant background information	including any employee relations issues which may be rele	want to the referral or to rehabilitatio	n.	
Users overview	<i>.</i> ?	 Made the individual aware of the reasons for Stated clearly the information feedback you re 	eferral and the nature of the advice sought.			
Create new user	>	 Stated clearly the mornation reedisck you to Acknowledged the constraints associated with 	n medical confidentiality.			
♡ Other						
MI reports	<u>,</u>	Previous step Cancel referral Se	end referral			



Tracking the Status of Your Referral

You can track the status of your referral by logging back into the portal at any time, selecting 'All referrals' from the control tab.

Cognate Heal	Ith	← Back											
Case Management Create new case	\$	Referra Home / Refe	Is errals										
All cases	>												
Open cases	>	Search for	cases	Search all colum	ns 👻 Se	arch all		 Select 	departmen	t 💉	Select di	vision	✓ Search
Closed cases	>	Referral ID	Employee	Referred by	Last modif	fication	Referral date	Dep/Division	Booked	Attended	Complete	SLA	Status
Open referrals	>	10666	Ms Test Test Test, Car	Test Manager, Charlotte	4/5/2022 -	2:10PM	29/4/2022						Referral made
Closed referrals	>	10670	Ms Test Test Test,	Test Manager, Charlotte	4/5/2022 -	2:09PM	29/4/2022						Referral made
Employee Manageme	int		cui	enteriorite									
	>	10639	Ms Test, Charlotte	Test Manager, Charlotte	4/5/2022 -	2:06PM	28/4/2022					SLA	Employee attended
Create new employee	>	10723	Ms Test, Charlotte	Test Manager, Charlotte	4/5/2022 -	1:51PM	4/5/2022		٠			SLA met	Appointment booked
Jsers overview	>	10674	Ms Test Test Test, Car	Test Manager, Charlotte	3/5/2022 - 10:00AM		29/4/2022					SLA met	No booking made
Create new user	è	10656	Mr Charlotte, Test Portal	Test Manager, Charlotte	28/4/2022 4:53PM	-	28/4/2022	Clerical Department					Attach relevant documents
2 Other	~							an approximation.					
	×	10565	Mr Iest, Mick	lest Manager, Charlotte	28/4/2022 12:57PM		28/4/2022						Waiting for referral form
* U	8	10561	Mr Test, Mick	Test Manager,	28/4/2022		28/4/2022						Waiting for referral

To view appointment details, such as date, time, and location, please select the employee's referral from the rows in the 'All referrals' tab.

You will be able to view the details, as shown below.

IMPORTANT – Please do not use the text messaging feed, our administration team are not notified of any messages that are sent, and queries/requests will be missed.

Please email centraladmin@cognatehealth.ie or if you have an OHA Onsite, please email the OHA (Nurse) directly if you have any queries on the referral or wish to make any changes to the appointment.

All referrals	>	12	
	>		
	>		
🕈 Employee Managemen	ıt	Referral Messaging	
	>	Available moreone feede	Foley, Caroline 01/11/2024 - 11:39AM
	>	Available message recos	The appointment has been booked on Test Onsite Clinic at 01/11/2024 12:00:00 with OHP, Test .
♡ Other		Foley, Caroline 01/11/2024 - 11:39AM The appointment has been booked on Test Onsite Clinic at 01/11/2024 12:00:00 with OHP. Test	Write a message
	>		
	>		
My Account	>		Add new message



Viewing The Report

To view the employee's report once released, you can select the referral as shown above, and it will bring you to the below page.

Here you can click 'OH Report.pdf' – This will open the report in a new window.

You can download this report if you wish.

Referral Messaging				
Available message feeds	Start new feed	Foley, Caroline 01/11/2024 - 11:39AM The appointment has been booked on Test Onsit	te Clinic at 01/11/2024 12:00:00 with OHP, Te	st .
The appointment has been booked on Test Ons	ite Clinic at 01/11/2024 12:00:00 with OHP, Test	Write a message		ĥ
		Add new message		
Referral Documents				
File name	Author	Comment	Date	
🖹 OH Report.pdf	Foley, Caroline		1/11/2024 - 11:41AM	
Referral letter.pdf	Miss Casey, Test Janice		1/11/2024 - 10:36AM	
Related Appointments				
Туре	Time/Date	Status	Clinician	Site
OHP Assessment (Face to Face)	1/11/2024 - 12:00PM	Attended	Doctor OHP, Test	Test Onsite Clinic

Requesting a Follow-Up

To request a follow-up, select '*Open Cases*' on the control panel to the left. Search for the employee and select 'Request Follow-up' at the top of the page, highlighted below.

You can also close the case here if the employee no longer requires OH Services for this health reason.

		Cases overview 🖪 Request follow-up	Close case		
O Case Management					
All cases	>	Case Details		Employee Details	
Closed cases	>	Case ID	291597	Employee Name	Mille Brown
		Status	🗁 Open	Employer Name	Test Portal Janice
		Reason	OH Case #291597	Employee ID	
		Case Opened Date	27/11/2024	Department	Admin
😁 Employee Management		Case Closed Date			



Important Notes to Remember

- **1.** If you do not have visibility on an employee, you will have to add the employee to your portal to refer them.
- If you have tier one access (Access to only your own referrals) Please <u>do not add employee</u> <u>details and log out</u>, you will have to re-register the employee. The employee will only be saved to your portal AFTER you have made the referral.
- **3.** When referring an employee, please check that all relevant fields are filled in and details are correct. **Please remember to fill in the personal email address field.**
- **4.** If you are unable to proceed with adding an employee, and receive an error message stating the employee exists, please contact central admin, or if you have an onsite OHA, please contact them directly.
- **5.** The employee will receive an email confirmation of their appointment date, time, and location of the assessment. This is an automatic email sent to the email populated in the *personal email address field.*
- **6.** Any forms required for the consultation (Pre-Employment Questionnaire, Assessment Consent Form) will be sent automatically to your *employee's Personal email address*.
- **7.** Please log back into the portal to track the status of your referral and appointment details once booked.
- **8.** You will receive an email once the report is completed and released back to the portal. Steps to view the report are highlighted above.
- **9.** Please do not use any messaging/chat fields on the portal. This messaging platform is not monitored. Our central admin team **respond by email only.**
- **10.** If the employee is unable to attend, or must reschedule, please contact central admin, or your onsite OHA, to make the necessary changes to the appointment.