



# Client Service Guide

Warwickshire County Council



## Contents

1. Introduction .....	1
2. How Duradiamond differ from other Occupational Health companies. ....	1
3. Who's Who at Duradiamond .....	2
4. The Rehabilitation Golden Rules.....	3
5. Account Management .....	4
5.1 Registration .....	4
5.2 Login.....	6
5.3 Logout .....	7
5.4 Forgotten Password .....	7
5.5 Navigating your Homepage .....	8
5.6 Recent Notifications.....	8
5.7 How to Make a Good Referral .....	8
5.8 Library and Information (Support guides & bulletins).....	8
5.9 Forms .....	8
5.10 Partially Completed Forms.....	9
5.11 Case Tracking .....	9
5.12 Searching within the case tracking section.....	9
5.13 How to manage your online account and your personal information .....	10
6. Permission Controller Features .....	11
6.1 Permission to share your own cases.....	11
6.2 Permission to reallocate your own cases.....	12
6.3 Team HR accounts; Permission to be an 'HR Referrer' .....	14
6.4 The Colleague Portal .....	14
7. Questionnaires .....	15
7.1 Requesting a new questionnaire .....	16
7.2 Questionnaires – Colleague completion.....	17
7.3 Questionnaire Outcomes .....	18
7.4 Standard PPQ Process Flow .....	20
8. Collecting Outcome Documents .....	20
9. Referrals .....	22
9.1 Standard Management Referral .....	21
9.2 Ill Health Retirement Referral.....	22



9.3	Making a new Referral .....	22
9.4	Tracking a Referral .....	24
9.5	When To Collect Advice Reports or Outcomes .....	24
9.6	The Colleague’s Consent Options .....	24
9.7	How to collect your report.....	25
10.	Save a partially completed form for later .....	26
11.	Security .....	27
12.	Key Contacts Responsibilities.....	27
13.	Our Service Offering.....	28
13.1	Retainer Services.....	28
13.2	Additional Services.....	28
13.3	Management Training.....	28
13.4	Wellbeing .....	28
13.5	Psychological services .....	30
14.	RIDDOR (Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013) .....	30
15.	Summary Breakdown Of Your OH Services And What They Are .....	31
16.	Abbreviations and Acronyms .....	32



## 1. Introduction

Duradiamond Healthcare provide an independent, confidential occupational health service to your organisation.

Occupational health is dedicated to helping people to keep well, and to help them work to their potential in spite of health problems, as and when these do arise. We know that work is an important ingredient of staying well, and beneficial for people who are having to cope with illness, so helping people to remain in work isn't just good for employers, it's good for their staff too.

The occupational health service is delivered by professionals from a variety of backgrounds, so we can draw on the kind of skills and experience that are most appropriate for each individual colleague who is referred to our service.

As we handle personal, sensitive data, Duradiamond provide a secure online portal for clients to use which allows you to create new cases, provide supporting documents, track case progression and collect outcome documents.

The portal also contains helpful reference resources covering a wide range of medical topics, offering support to line managers and HR staff or Colleagues, as well as guides on topics such as what Occupational Health is and what a Colleague's rights are in terms of their medical records and consent.

This guide explains how to register for an account on our portal and how to use the various features of this. If, during any of the actions described in this document, you have any problems or queries, you can contact your Client Associate Team or Account Manager for support.

## 2. How Duradiamond differ from other Occupational Health companies.

At Duradiamond we take a holistic approach to Occupational Health services and ensure that we are supporting both employers and employees to achieve good health and wellbeing in the workplace. We believe that excellent quality services should always be at the heart of everything we do and every aspect of our service is aimed at achieving this.

One of the most valuable parts of our service is having an allocated Chief Medical Officer (CMO) who gets to know you and your business. By learning about your organisation and the problems you encounter, we are then able to tailor our service to meet your needs. Your CMO will assist with both your organisational health strategy and also by being involved in managing day to day cases.

Duradiamond also ensures that wherever staff have access to additional services such as Employee Assistance Programmes, that we are integrating with these services and signposting employees to additional benefits that they may have.

Our holistic approach to Occupational Health also includes the provision of Wellbeing programmes, Physiotherapy services, Mental Health treatment, Mental Health training and support for managers, and other specialist services to ensure that we can fully service all of your business' health related needs. Each of our clients has a bespoke portfolio of services included within our contract and these are agreed between your dedicated Account Manager and their key contact within your organisation.

Should you feel that you require an 'OH Needs' assessment we are able to conduct one, in this instance please liaise with your dedicated Account Manager.



### 3. Who's Who at Duradiamond

We believe that the best quality services can only be supplied if we get to know your organisation really well. In order to do this, we allocate named contacts to build trusted relationships with your HR team and managers.

Chief Medical Officer	Dr Simon Sheard FFOM	Responsible for overseeing the clinical service supplied to your employer and advising on your organisations strategic health plan.
Account Manager	Teresa Walker	Responsible for overseeing the non-clinical aspects of the service and contractual agreements.
Administration Team	Client Associate Team <a href="mailto:team2@duradiamondhealth.com">team2@duradiamondhealth.com</a> Tel: 01273 023161	The administration team are your main point of contact and are there to answer day to day queries. The Client Associate team are responsible for booking all appointments, processing paperwork and reports.



#### 4. The Rehabilitation Golden Rules

As your Occupational Health provider, we want to work as closely as possible with you to get colleagues back to work following periods of sickness absence. We therefore have identified some 'golden rules' to help you support your staff. Please try to keep these in mind wherever possible:

- Identification of individuals who are struggling at work before they go off work and seek a referral or use the CMO advice line.
- Early intervention for those who become absent from work, the earlier we receive the referral, the more we can do to help.
- We provide expert triage, so the most appropriate clinician looks after each colleague.
- Supporting early return to work is imperative to maximise the chance of clinical improvement and avoiding risks of further work absence.
- We work with managers to create "accommodating" workplaces to support those with temporary or long-standing impairments or disabilities to work productively.
- Creating workplaces that promote a culture of health, well-being and resilience.
- Supporting managers in creating good quality and supportive working relationships with their team.



## 5. Account Management

### 5.1 Registration

Before you can use the online portal to submit and track cases, you will need to register for an account. This should only take a few minutes to complete.

To start, follow this link or copy and paste it into the address bar on your browser – <https://portal.duradiamondhealth.com>



Click 'Register' in the top right of the page and you will be taken to the following screen:

On this page, you will need to enter your Registration Code. This is a letter and number combination unique to your organisation and will be given to you by the contact managing the implementation of our services. This may be your line manager or it may be a contact within your HR department.

Once you have entered the code you will be directed to select a password.

*Please Note: Passwords must be at least 8 characters in length and contain a mix of upper and lower case letters, numbers and symbols.*

*You will only be able to register for an account using an email domain approved by your organisation, this should be your work email address. We cannot accept domains such as @live.co.uk for example.*



Next you will need to complete your details as part of the registration process. When you submit a new case to Duradiamond, these details will automatically appear on the case so you only have to enter the details once.

Gateway Register Login

### User Registration

Please enter the following information.

**Title:**

**Forename:**

**Surname:**

**Job title:**

**Telephone number:**

**Mobile number:**

**Division:**

**Location:**

**Department:**

When you have completed this step click 'Register' to submit your details. You will be directed to the following screen:

Gateway Register Login

### User Registration

Your account registration has been successful!

In order for us to verify your email address, you will shortly receive an account activation link.  
 Once your account has been activated you will be able to log into the site.

The online system will send activation email to the address you provided. When received, click on the link to activate your account.

Gateway Register Login

### Account Verification

Your account has been successfully verified!

You will shortly be redirected to the login page where you can login and access your account.  
 If you are not automatically redirected, please click [here](#).

You should be redirected and prompted to login, if not click on the link provided. Your account is now active and you are able to login.

*Please note that if you do not click on the link that is emailed to you, your registration will not be fully complete and you will not be able to access your account on the portal. Please ensure that you complete the process by doing this last step.*



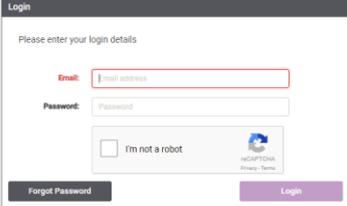
## 5.2 Login

To log into the portal, follow this link or copy and paste it into the address bar on your browser

<https://portal.duradiamondhealth.com>

 Gateway

[Register](#) [Login](#)



Login

Please enter your login details

**Email:**

**Password:**

I'm not a robot 

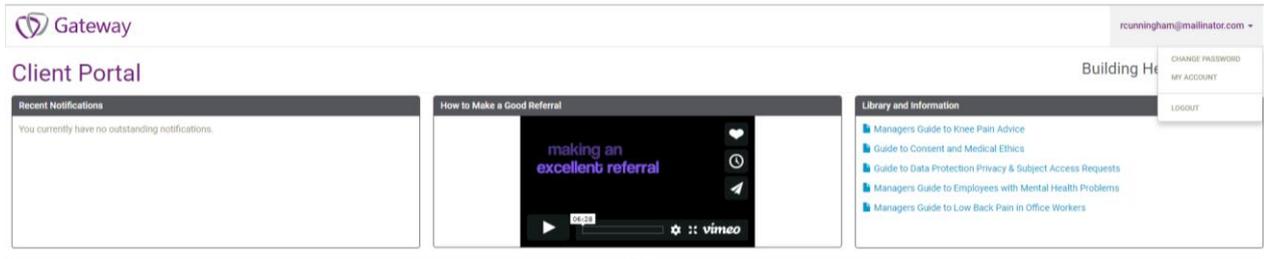
[Forgot Password](#) [Login](#)

Click 'Login' at the top right of the screen and enter your details. This will take you to your homepage. All actions and information are accessed from this screen.



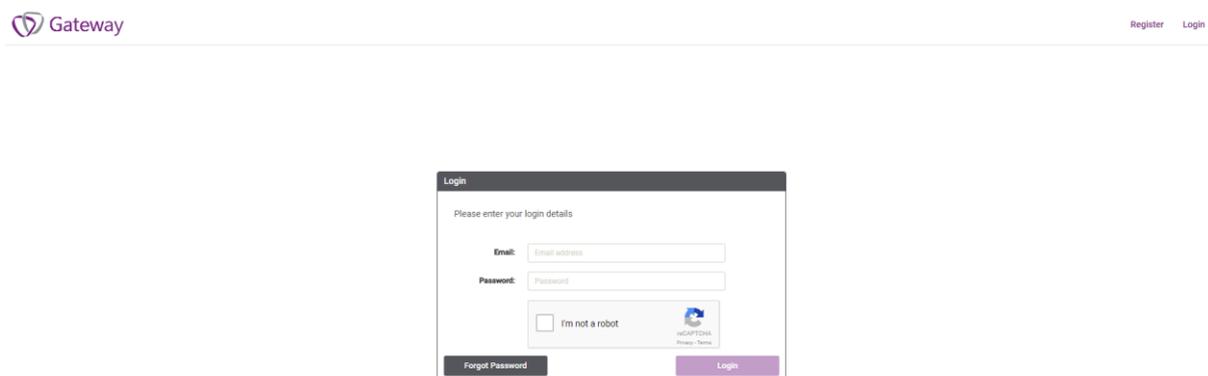
### 5.3 Logout

Once you have finished using the portal you will need to logout. To do this, click on your email address in the top right of the page and select 'Logout' from the dropdown list.



### 5.4 Forgotten Password

If you have forgotten your password, you can reset this from the Login page. Click on 'Forgot Password'



Enter the email address you registered to the portal with and click 'Submit'.

If the email address provided matches that in our database, you will be sent an email with a link to reset your password.

If you do not receive an e-mail, please contact Duradiamond directly so that we can provide further support.



## 5.5 Navigating your Homepage

Gateway rcunningham@mailinator.com

Client Portal Building Healthy Business

**Recent Notifications**

You currently have no outstanding notifications.

**How to Make a Good Referral**

making an excellent referral

0:00 / 0:00

viméo

**Library and information**

- Managers Guide to Knee Pain Advice
- Guide to Consent and Medical Ethics
- Guide to Data Protection Privacy & Subject Access Requests
- Managers Guide to Employees with Mental Health Problems
- Managers Guide to Low Back Pain in Office Workers

**Forms**

Referral	Referral	Referral	Referral

**Partially Completed Forms**

Created	Form	Action

## 5.6 Recent Notifications

The notifications section lists any recent activity on your cases such as appointments being booked or outcome documents being published.

## 5.7 How to Make a Good Referral

The quality and relevance of the advice you receive from us following a referral is closely linked to the quality of the information that Duradiamond receive on the referral form you submit. This video, from Dr Emslie, provides practical guidance on how to complete referral forms to get the best possible outcome reports.

## 5.8 Library and Information (Support guides & bulletins)

This section of the homepage contains our library of support guides. These cover a wide range of medical topics, offering support to line managers, HR staff and colleagues as well as guides on topics such as what Occupational Health is and what a colleague's rights are in terms of their records and consent.

We also have some podcasts from our clinical staff giving guidance on a number of topical subject matters; including help for managers in relation to common medical problems and some general information about OH and how it all works.

## 5.9 Forms

From the forms section, you can launch new questionnaires or referrals by simply finding the relevant option and clicking 'launch'.



## 5.10 Partially Completed Forms

Once you have started a questionnaire or referral you are able to save it at any point. You can then come back to the form and complete it in the future or delete the form if it's no longer required.

## 5.11 Case Tracking

The case tracking list is a list of all open and completed cases which you have submitted. The 'Status' and 'Outcome' columns will be updated as your cases progress through their lifecycle with Duradiamond and means that you can see live case progression information here.

## 5.12 Searching within the case tracking section

You will now be able to create searches within the case tracking section. This will assist you with finding individual cases.

The searching facility is located at the top of the case tracking section, just below the green banner.

To search, click on the drop-down list and select from one of the available options.

Once you have selected a drop down, enter in the text box the criteria which you would like to search by, then click search.

The system will then apply your search and bring up the case you are searching for.



Case Tracking				
Case Reference	Name	Submitted	Status	
▶ DEMO/MR/18/7	Jones, David	02/05/2018 16:04	Triaged	

If you wish to clear your search to return to the full case tracking list, or to create a new search then click on reset.

Case Tracking

Employee Surname ▼ Jones Search Reset

### 5.13 How to manage your online account and your personal information

On the dashboard page that appears when you first log in, in the top right hand corner will appear your email address and a downwards arrow.

If you click the downwards arrow, options will appear for you to select: change password, my account and log out.

rcunningham@mailinator.com ▼

Building He

Library and Information

- Managers Guide to Knee Pain Advice
- Guide to Consent and Medical Ethics
- Guide to Data Protection Privacy & Subject Access Requests
- Managers Guide to Employees with Mental Health Problems
- Managers Guide to Low Back Pain in Office Workers

CHANGE PASSWORD  
MY ACCOUNT  
LOGOUT

By selecting the My Account button the system will then take you to a further page where you are then able to amend all of your personal information that is included when you initially registered.

*It is important to keep your personal information on your account up to date and correct as Duradiamond will use these details to contact you about cases regularly.*



## 6. Permission Controller Features

Each HR personnel or line manager who has an account on our system will only have access to specific features. These will be dependent on the permissions which have been allocated to them by the super user. The super user is responsible for managing each users permissions and they can adjust your permissions as necessary. Your super user is likely to be the person within your organisation responsible for overseeing the Occupational Health contract. They are likely to be in HR, Wellbeing or a Health and Safety representative.

### 6.1 Permission to share your own cases

The permission to share your own cases will allow you to assign other registered users to individual cases should they need to access the case information and reports, etc. You can create case shares on a case by case basis, for a limited period of time, which can range from one day up to a maximum of thirty days. After this time period has elapsed, the case share will automatically be removed by the system.

To share a case, locate the case in the case tracking section and then click on the button in the 'sharing' column.

The screenshot shows the 'Case Tracking' interface. At the top, there is a search bar with 'Select a Column' and 'Search term' dropdowns, and 'Search' and 'Reset' buttons. Below is a table with the following data:

Case Reference	Name	Submitted	Status	Outcome Document	Sharing	Referrer
DEMO/MR/18/7	Jones, David	02/05/2018 16:04	Triaged			Cunningham, Rebecca (me)

A blue arrow points from the 'Sharing' icon in the table to a larger 'Sharing' button with the same icon below it.

A new page will then appear with a list of all the registered users, with whom you can choose to share the case.

The screenshot shows a user selection list and a sharing configuration form. The user list has the following data:

<input type="checkbox"/>	Emily Williams	Administrator	emilywilliams@mailinator.com
<input type="checkbox"/>	Jacob Shelley	Marketing Manager	jacobshelley@mailinator.com
<input type="checkbox"/>	Layla Barker	Finance Director	laylabarker@mailinator.com

Below the list is a pagination control showing '1 of 1 pages (4 items)'. The sharing configuration form has the following fields:

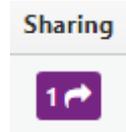
- Employee Name:** David Jones
- Case Status:** Triaged
- Case Created:** 02 May 2018, 15:57
- Share duration (days):** 5

At the bottom, there are 'Cancel' and 'Add Shares' buttons. Blue arrows point from the text above to the 'Add Shares' button and the 'Share duration (days)' field.



Locate the user with whom you wish to share the case with and tick the box on the left side of their name. You can change the duration of the case share by adjusting the number in the 'share duration' box, (the default is 5 days). Please note you can share a case for up to a maximum of 30 days.

You will then see the button in the 'sharing' column has changed, and it will have a number next to it, reflecting the number of shares for that case.



If you click on the sharing button you can review the shares, add more shares or cancel your shares.

You can cancel existing shares by clicking on the purple cross, on the right of each share.

Share Details - CPS/MR/18/1 ✕

Current Shares

Name	Created	Duration	Expires	
Jacob Shelley	02/05/2018 16:26		07/05/2018 16:26	✕

1 of 1 pages (1 items)

**Employee Name**  **Case Status**

**Case Created**

Add Shares
Close

You will also receive an email to confirm that you have successfully shared the case.

Dear Rebecca Cunningham,

You have shared case CPS/MR/18/1 starting on 02/05/2018 15:26 for 5 days expiring on 07/05/2018 15:26 with the following people:

- Jacob Shelley

While this case is shared, they will be able to view the status of the case from their Gateway dashboard, receive copies of any notifications that concern this case and can access any associated outcome reports.

Kind Regards,

The Occupational Health Service

Also, the person with whom you shared the case will also receive an email to confirm the share.

## 6.2 Permission to reallocate your own cases

In addition to being able to temporarily share your cases, you will be able to permanently reallocate your cases to other line managers or HR personnel. If you reallocate a case, then this is a permanent change to the case manager and you will no longer be able to see that case.



To reallocate a case, identify the case in the case tracking section and click the blue arrow on the right-hand side.

Case Tracking <span style="float: right;">Expand</span>								
Select a Column		Search term		Search		Reset		
Case Reference	Name	Submitted	Status	Outcome Document	Sharing	Referrer		
▶ DEMO/MR/18/7	Jones, David	02/05/2018 16:04	Triaged		0	Cunningham, Rebecca (me)	➔	

The following box will then appear asking you to confirm who the case should be reassigned to. You can start typing in the name of the person who you wish to reassign the case to, or use the search button on the right.

### Reallocate Case CPS/MR/18/1 ✕

This case will be permanently reallocated to the user selected below.

**Reassign to**  🔍

Cancel
Reallocate

Other registered users names will then appear, and you can use their email address, division, location and department to identify the correct individual to transfer the case to.

Select the users name to whom you wish to reallocate the case and click reallocate.

### Reallocate Case CPS/MR/18/1 ✕

This case will be permanently reallocated to the user selected below.

**Reassign to**  🔍

**Layla Barker**
laylabarker@mailinator.com

Cancel
Reallocate



You and the person you reallocated the case to will both receive an email to confirm the case reallocation.

Dear Rebecca Cunningham,

The following cases have been permanently reallocated to Layla Barker on 02/05/2018 15:30 by Daisy May

- CPS/MR/18/1

Kind Regards,

The Occupational Health Service

### **6.3 Team HR accounts; Permission to be an 'HR Referrer'**

If your organisation has a group HR inbox which needs to be assigned to your cases, your super user will be able to allocate a permission called 'HR Referrer' to these accounts.

Once the 'HR Referrer' permission has been assigned to the group HR inbox account, then the Duradiamond administrative teams can assign the account as a second case contact.

This will allow your central HR teams to have an account with secondary access to cases through the online portal. You will need to liaise with your Account Manager if you wish to have a general set up and process for use of 'HR referrers' for your company. Alternatively, you will need to liaise with the administration team on a case by case basis to identify individual cases which need to have an HR referrer assigned.

The HR Referrer's team account will be able to see all the cases which are allocated to them in the case tracking section. They will also receive email updates on the cases, be able to view outcome reports and referrals on the portal also.

### **6.4 The Colleague Portal**

As well as HR team members having access to the portal, Duradiamond also have a portal specifically designed for employees to use.

When OH input is required the colleague will be invited by Duradiamond to create an account that is linked to their personal email address. On this portal, the colleague will be able retrieve their advice reports and also keep a record of their ongoing Occupational Health advice letters and activity.

The Colleague will be able to access a number of self-help documents and video's including the following:

- Podcasts from the Duradiamond clinical team on Occupational Health, what happens in an appointment and other topical subject matters.
- Self-help guides and bulletins



## 7. Questionnaires

This relates to any questionnaire which you are asking the Colleague to complete. This includes but may not be limited to:

- Pre-placement Questionnaires (PPQ)
- Night Worker Questionnaires (NWQ)

Forms such as the Night Worker Questionnaire are a fixed set of questions. However, the PPQ form employs a variable approach. As part of the PPQ process, Duradiamond are required to ask questions only which are relevant to the person's role. Therefore, depending on the requirements of their role the questions will vary accordingly. Because of this, our form must be flexible to consider the different activities staff may be conducting. For example, we would need to ask a sedentary office worker different questions to an individual working at heights as they are exposed to different risks.

Duradiamond's core PPQ form is the QF30 Pre-Placement Questionnaire. To make sure that the right individuals are asked the right questions, Duradiamond employ the use of a set of addendums. These addendums focus on specific risks and each ask a specific set of questions.

- QF 34 – Driving, safety critical, heights, confined space and dangerous machinery
- This might be a staff member working in heavy industry, waste disposal, with live electricity or piloting an aircraft for example.
- QF 35 – Nightworker
- Night workers are defined as staff regularly working for more than three hours between the hours of 23:00 and 06:00.
- QF 36 – Working with sensitisers or in laboratories
- This could be staff working in labs or other environments where they might be exposed to animals, chemicals, hazardous materials or biological agents.
- QF 37 – Food handlers
- Staff working in food preparation, this could be industrial or at the point of delivery.
- QF 38 – Working with, or in the vicinity of, children or vulnerable adults
- This could be support staff in care homes or those offering at home assistance, those working in schools or those working with adults in sheltered accommodation.
- QF 39 – Healthcare workers and ancillary staff in healthcare settings. (not Exposure Prone Procedures (EPP)).
- The customer must decide who they believe should be assessed as a Health Care Worker using appropriate risk assessment methods.
- 

When you request a new PPQ via the online portal you will be asked to identify which activities the Colleague's job role entails. The online portal will then automatically add the appropriate addendums based on the information you have provided. **It's therefore crucial that you accurately select the right activities for each employee.**



## 7.1 Requesting a new questionnaire

To request a new questionnaire, select the relevant option from the 'Forms' section by clicking launch.

The 'Forms' section displays four referral questionnaire options, each with a 'Launch' button:

- Referral**: QF30 - Pre Placement Questionnaire
- Referral**: QF21 - Workstation Assessment
- Referral**: QF23 - Ill Health Retirement Referral
- Referral**: QF20 - Management Referral

The first page explains what the form is and what it should be used for. You will then need to complete each tab in order.

**Pre-Placement Questionnaire**

Colleague's Details 2 / 3

Any field marked with a '\*' is mandatory and must be completed before you can submit the referral

Use the 'next' and 'back' buttons to navigate through the pages

The 'save' button allows you to save your progress so that you can continue to complete the form later.

The form includes the following fields:

- Title \*
- Forename \*
- Surname \*
- Date of Birth \*
- Job Title \*
- Division \*
- Location \*
- Department \*
- PO/ Cost Centre Number
- Hours to be worked \*
- Full or part time:  Full Time  Part Time \*
- Home Telephone \*
- Work Telephone \*
- Mobile \*
- Email Address \* ?
- Address Line1 \*
- Address Line2 \*
- Address Line3
- County
- Postcode \*

Navigation buttons: Back, Save, Next

*Please note: when asked to provide the Colleague's details, this must be their personal email address not their work email.*



When confirming which activities, the Colleague's job role entails, please check that any activity which may form part of their job role is included to ensure that Duradiamond ask them the correct medical questions.

Once you've finished selecting activities, click on the 'Complete' button to send the questionnaire request to the Colleague. You will be taken to the following holding screen and then directed back to your homepage.

Pre-Placement Questionnaire

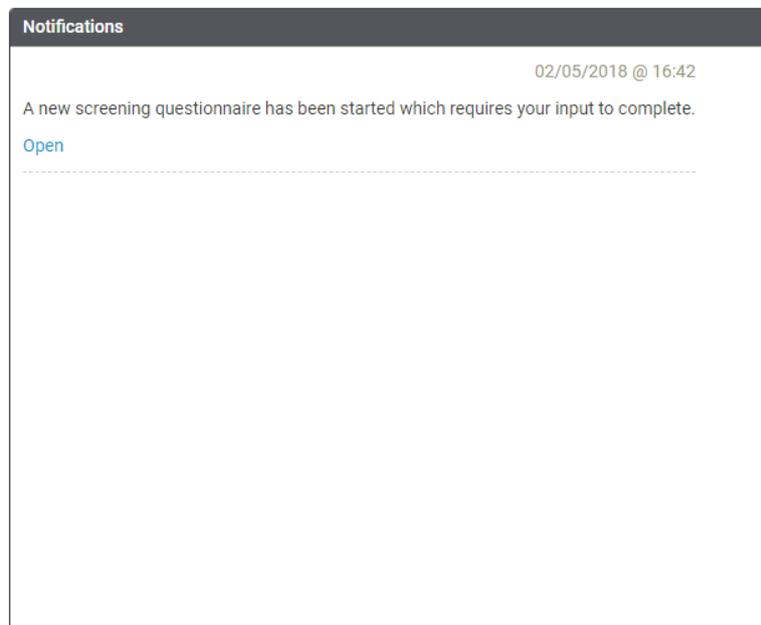
Form Successfully Submitted!

Your form has been successfully submitted and will be processed shortly.  
You will be automatically re-directed in 5 seconds, if you are not redirected automatically, please click [here](#).

## 7.2 Questionnaires – Colleague completion

Colleagues complete and return questionnaires through our online Colleague portal. The Colleague will be sent an email at the address you have provided asking them to register for the portal, they will only need to do this once.

Any questionnaires that you have asked them to complete will be waiting for them when they first log in.



The Colleague clicks on the 'Open' link to access the questionnaire for completion. They navigate through the medical questions in the same way HR's do to generate the requests and when they are finished they submit their response.



The Colleague will receive an email confirming that Duradiamond have received their form and that it is being processed.

### **7.3 Questionnaire Outcomes**

The Colleagues responses are submitted directly to Duradiamond and are automatically allocated to our Occupational Health Advisors for screening.

You will receive an email from the assessing OHA as soon as a case has been reviewed.

We will issue a Fitness Certificate which will have one of the following outcomes:

The Colleague is:

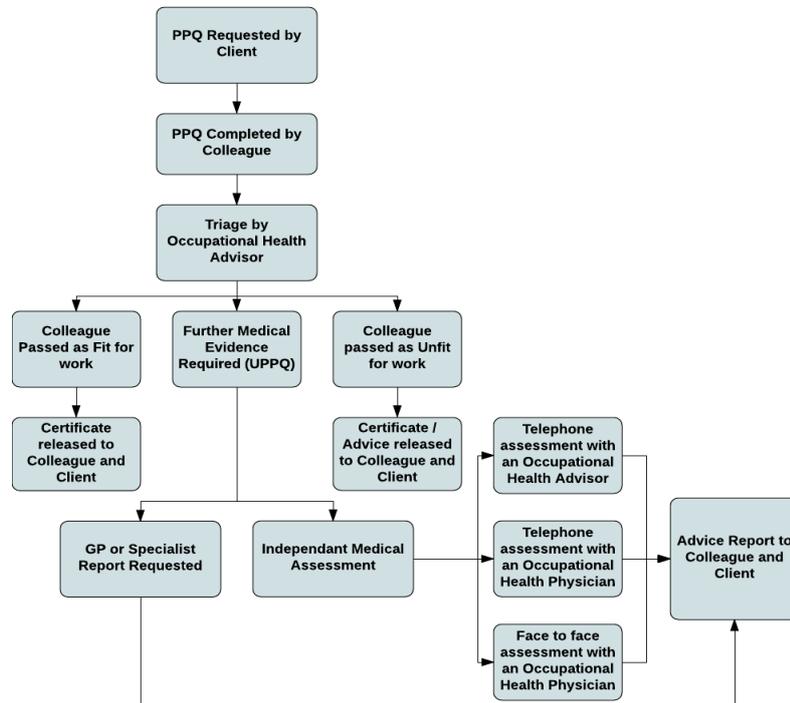
- Fit
- Fit with the recommendation of a DSE assessment
- Unfit
- Further medical evidence is required before Duradiamond can comment on fitness for work.

In all instances, you will receive an email confirming that the questionnaire has been screened and that an Outcome Certificate will be available for you to collect from your portal account.

If further medical evidence has been suggested, you will need to let your Client Associate Team know if you are happy for us to proceed with this (unless your organisation has set up an automatic approval agreement with us) as additional costs will be incurred in doing so.



## 7.4 Standard PPQ Process Flow



## 8. Collecting Outcome Documents

This next section provides some information on how to collect outcome documents from your portal account, where to find them and how it works.

Client Portal Building Healthy Business

**Recent Notifications**

You currently have no outstanding notifications.

**How to Make a Good Referral**

making an excellent referral

04:21

viméo

**Library and Information**

- Managers Guide to Knee Pain Advice
- Guide to Consent and Medical Ethics
- Guide to Data Protection Privacy & Subject Access Requests
- Managers Guide to Employees with Mental Health Problems
- Managers Guide to Low Back Pain in Office Workers

**Forms**

Launch

Screening

QF30 - Pre-Placement Questionnaire

Launch

**Partially Completed Forms**

Created	Form	Action
No records to display		

**Case Tracking**

Select a Column Search Search Reset

- Log into the portal
- On your homepage screen, scroll to the bottom of the screen to the 'Case Tracking' section.
- Locate relevant case. You can sort any of the columns by clicking on the header.
- If there are outcome documents on a case, then 'View' will appear in the final column to help you identify these.
- You can either click on 'View' or expand the case and select the outcome document you want to view.



- This will open in a separate browser window.

From here you can either print or save the document.

*Please ensure that all outcome reports and certificates are downloaded from the portal and saved on your organisation's personnel files. Documents published to you will not remain on the Duradiamond Client Portal indefinitely and therefore you will need to save a copy for your records.*



## 9. Referrals

You may wish to refer a staff member to the Occupational Health Service for a number of reasons. There are a set of different referral options to use depending on the type of medical advice you require.

These options are:

- Standard Management Referral
- Work Station Assessment Referral
- Ill Health Retirement Referral

Every referral received will be triaged by a member of our clinical team. They will review the questions you have asked along with the medical history provided to determine the best method of progressing the case. This could be via a telephone consultation, face to face appointment, a report from the Colleague's GP or Specialist, or a combination of these.

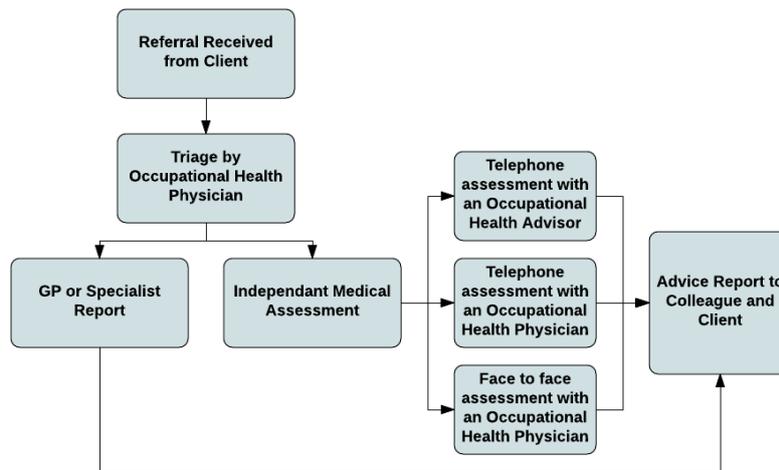
You will be informed of the triage decision as soon as the referral has been reviewed and our Client Associates will proceed with any actions as soon as possible, keeping you updated on their progress.

A breakdown of the referral types are as follows:

### 9.1 Standard Management Referral

A standard Management Referral is used for the timely management of work related cases. A management referral enables you to gain advice on a colleague's health in relation to their work. Usually a Management Referral would be triggered by the colleague having a significant period of sickness absence, short recurrent periods of sickness absence or by them disclosing a condition to their employer which may have an impact on them in the workplace.

When providing advice following a Management Referral we advise on the person's fitness for work and recommend any adjustments that the business should consider putting in place for them. We also answer any specific questions that were asked on the referral form to help your business progress forward with the individual.



## 9.2 Ill Health Retirement Referral

An Ill Health Retirement Referral is used when someone wants to gain access to their pension before the retirement age on the grounds of Ill Health. The work that Duradiamond do will entirely depend on the requirements of the pension scheme. This could mean that we gather medical evidence for the pension scheme or we may provide a recommendation if the individual is eligible for their early Ill Health Retirement benefit, this will depend on the requirements of the scheme.

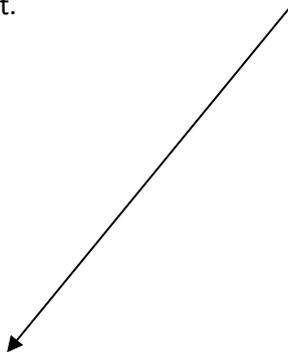
## 9.3 Making a new Referral

Submitting a comprehensive referral form to Duradiamond helps to ensure that the medical advice you receive in return is of the best quality and relevance.

We recommend that you include some of the following points in your referral:

- Current and historic sickness and absence levels.
- What is the current diagnosis on their fit note if absent from work?
- Are you aware of any other 'active' medical problems, either physical or psychological?
- Are there any pending or recent grievances?
- Is the employee being informally or formally managed under your organisational policies?
- Are there any known barriers to them returning to work?
- Have you implemented any adjustments already? How have these been received?
- Has the employee asked for any adjustments that just aren't practicable for you?

To make a new referral for you start at dashboard and select the relevant referral form that you would like to submit.





**Client Portal** Building Healthy Business

**Recent Notifications**

You currently have no outstanding notifications.

**How to Make a Good Referral**

making an excellent referral

▶ 10:22 vimeo

**Library and Information**

- Managers Guide to Knee Pain Advice
- Guide to Consent and Medical Ethics
- Guide to Data Protection Privacy & Subject Access Requests
- Managers Guide to Employees with Mental Health Problems
- Managers Guide to Low Back Pain in Office Workers

**Forms**

Launch

Screening QF30 - Pre-Placement Questionnaire

Launch

**Partially Completed Forms**

Created	Form	Action
No records to display		

**Case Tracking**

Select a Column Search form Search Reset

Navigate through the screens completing the information that the system asks for including the person's job activities and information about the employee's health and absence as per the above bullet points.

### Management Referral Form

**Absence Data** 4 / 8

If applicable, please provide the following information

**First day of absence**

**Total days absent in the calendar/rolling year**

**Total spells of absence in the calendar/rolling year**

**Diagnoses of absence**

You will also be able to upload supporting documents to the referral to provide Duradiamond with additional information, such as their job description and sickness absence history.

**Management Referral Form**

**Supporting Documents** 7 / 8

Please provide us with any supporting documents you feel may be relevant to this referral.

To complete the referral you will need to tick a declaration to confirm that the colleague has been made aware of the reasons for the referral and also that they are aware Duradiamond will be in contact with them regarding the referral going forward.



Management Referral Form

**Declaration** 8 / 8

I confirm the colleague is aware of this referral. (Please note the employee may request access to this document as part of their medical record at any time).

I confirm the colleague is aware they may receive an e mail from the OH Service, requesting further information prior to his/her assessment.

## 9.4 Tracking a Referral

In order to track the referrals that you have submitted log in to your account and start at dashboard page that initially comes up. Scroll to bottom of page to view the 'Case Tracking' section.

**Case Tracking** Logout

Employee Surname: Jones

Case Reference	Name	Submitted	Status	Outcome Documents	Sharing	Referrer	HR Referrer

Select the case reference number of the employee who's case you wish to view and a drop down will appear with their information.

## 9.5 When To Collect Advice Reports or Outcomes

Advice Reports will be produced following face to face appointments, telephone consultations or after a GP/Specialist report has been received. Colleagues are provided with a copy of any reports created by Duradiamond as a matter of course.

## 9.6 The Colleague's Consent Options

As stated above, colleagues will receive a copy of all reports provided by Duradiamond as a matter of course. They do also have the option of viewing these in advance of their employer should they wish to if they have been assessed by an OHP.

If a Colleague has chosen to view Duradiamond's advice prior to its release to you then you will receive a notification email from your Client Associate Team to confirm this.

If we have an email address for the Colleague, we will send the advice electronically and allow 2 working days for review. If the advice has to be posted then we will allow 3 working days from the date of release for the colleague to review the report. If during this time Duradiamond do not hear from the individual with any concerns, then the advice will automatically be released on to you.

Should the Colleague come back to Duradiamond with factual inaccuracies in the advice then this will be passed to our clinical team for review and amendment where appropriate. If this were to occur, your Client Associate Team would make you aware and keep you updated regarding a likely release date.

If a Colleague has requested to see their advice before their employer, Duradiamond are not able to discuss the content of that advice until the colleague has had the opportunity to review and respond.



## 9.7 How to collect your report

When an advice report is ready for you to view, you will receive an email notification prompting you to log into your portal to access it.

On the dashboard page which appears when you initially log in, scroll to the bottom of the screen to the 'Case Tracking' section.

Case Reference	Name	Submitted	Status	Outcome Documents	Sharing	Referrer	HR Referrer
----------------	------	-----------	--------	-------------------	---------	----------	-------------

- Locate relevant case. You can sort the columns by clicking on the header.
- If there are outcome documents on the case, then 'View' will appear in the final column to help you identify these.
- You can either click on 'View' or expand the case and select the outcome document you want to view.
- This will open in a separate browser window.
- 

From here you can print and save the document.

*Please ensure that all outcome reports and certificates are downloaded from the portal and saved on your organisation's personnel files. Documents published to you will not remain on the Duradiamond Client Portal indefinitely and therefore you will need to save a copy for your records.*



## 10. Save a partially completed form for later

The save for later function is available on both questionnaire and referral case types at the bottom of every page. This allows you to save any work you may have completed for submission later.

Cases which are saved for later will appear in the 'Partially Completed Forms' section of your homepage.

Created	Form	Action	
02/05/2018 16:55	QF30 - Pre Placement Questionnaire	<a href="#">Complete</a>	<a href="#">Delete</a>
02/05/2018 16:56	QF20 - Management Referral	<a href="#">Complete</a>	<a href="#">Delete</a>

Click on 'Complete' to open the form and finalise your case before submission.

Partially completed forms will remain in this section, if you no longer need to submit the form to Duradiamond then you can delete it from the system by selecting the 'delete' button.



## **11. Security**

Data held or processed by Duradiamond's bespoke IT system is completely confidential. Data is encrypted in transit and at rest, and a range of other managed controls provide a reliable framework to secure your data. The system and its associated processes are managed under an ISO27001 information security management system to provide evidential assurance that your transactions with Occupational Health are adequately and proportionately protected throughout their lifecycle in terms of confidentiality, integrity and availability and that they comply with relevant contractual, regulatory and legal requirements.

## **12. Key Contacts Responsibilities**

Within your organisation is a nominated contact responsible for working with the Account Manager at Duradiamond to oversee the OH service provision and ensure it is delivered in the best possible way for your business. As the relationship with your business and Duradiamond is very much a relationship whereby we work together to achieve the best possible outcomes, there are subsequently some responsibilities that fall to the Key contact in your company such as:

The key contact is responsible for notifying Duradiamond if there are any major organisational changes e.g. such as mergers or acquisitions. If there are any changes which will affect the companies head count or their structure. Duradiamond require up to date information on these aspects to accurately produce management reporting information and also to deliver a seamless, meaningful service.

The Key contact is also able to disable a user's account, should a manager or HR team member leave. They can also reallocate their cases to another member of the HR team to ensure reports are picked up internally.



## **13. Our Service Offering**

### **13.1 Retainer Services**

Within Duradiamond's pricing structure, there are some fees which are fixed annually and include specific services that your organisation will have unlimited access to across the duration of our contract. This allows managers and HR staff to use these services as often as is required without incurring additional costs to the business.

Included in your organisations' fixed retainer fee are the following services:

- Use of the 'CMO Advice Line' where any manager or HR personnel are able to speak with one of our experienced Occupational Health Physicians (a Doctor) to gain any OH related advice they require.
- Access to the Duradiamond online case management system where you can track the progress of your cases through time, submit referrals to us and retrieve the outcome reports.
- The management of your employees' occupational health medical records.
- Access to self-help support podcasts on the Duradiamond portal, giving advice on hot topics and aimed at improving overall understanding of Occupational Health and common health problems.

### **13.2 Additional Services**

We supply several additional services as well as those which are core to occupational health. As well as being able to supply risk management and absence management services we can provide a variety of assessments and programmes to support your organisations managers and colleagues in the workplace.

### **13.3 Management Training**

As well as providing your organisation with advice and reports on a case by case basis, we are also available on a consultancy basis to provide workshops and training courses for your HR and management teams. Our highly experienced and trusted suppliers are available to carry out these training sessions and we aim to upskill your managers to ensure that they can get the most out of using the OH service. These training courses also intend to empower managers so that they feel confident to manage staff in the workplace. We can support your organisation to ensure that your managers have the tools to confidently manage staff in this context with support from OH when required.

### **13.4 Wellbeing**

We have a portfolio of trusted suppliers with whom we work to provide a variety of wellbeing services. These range from talks with managers on mobility and stress, through to a variety of health screens. Many of these services can also produce management reports to inform your organisation on the health of your companies' population so that you can identify common issues and put in place strategies to make meaningful changes for your staff. If you are interested in obtaining these services, please contact your allocated Account Manager for more information.



### **13.5 Psychological services**

Mental health concerns have been a growing problem amongst modern society for many years now. In conjunction with this, awareness of mental health conditions is on the increase amongst our population. It is evident that following these two recent trends more and more people are open to talking about their mental health and are seeking support.

It is clear to us that occupational health providers need to keep up with changing trends. Therefore, our service provision for mental health conditions must change and adapt to sustain the present demand and meet the needs of our clients.

We are working very closely with trusted specialist providers and we are therefore able to offer a variety of new support programmes and assessments, for example;

- Therapy sessions for colleagues
- Specialist assessments which support OH advice
- Workshops for Managers and HR Representatives



#### **14. RIDDOR (Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013)**

Following an Occupational Health Referral, if our clinical team believe that your employee is suffering with a RIDDOR reportable injury, disease or condition we will advise so in our advice report to you.

Please note that it is the responsibility of the employer and not the OH Service to appropriately report any injuries, diseases or dangerous occurrences to the HSE. Therefore, you will need to notify the WCC HSW team immediately through the usual process.

<http://www.hse.gov.uk/riddor/>



## 15. Summary Breakdown Of Your OH Services And What They Are

Service Type	Service Function
<b>Questionnaires</b>	
Pre-Placement Questionnaire (PPQ)	To assess fitness for work and provide advice before someone starts a new role, identifying any adjustments that need to be considered.
Night Worker Questionnaires (NWQ)	Questionnaires intermittently sent to night workers as part of the HSE guidelines
<b>Referrals</b>	
Management Referral (MR)	An absence management referral to advise on fitness for work, adjustments, restrictions and to assist you in managing your employees' absence
Workstation Assessment Referral (WSA)	To assess a colleague's workstation to ensure its optimally set up for their needs
Ill Health Retirement Referral (IHR)	To assess if someone is fit for early Ill Health Retirement benefit.
<b>Additional Services</b>	
Management Training	Upskilling managers to ensure they get the most out of the DHC service and empowering them to manage ill health in the workplace
Wellbeing	We provide a variety of different wellbeing services including; screening, training, wellness days, wellbeing websites etc...
Psychological Services	A variety of services such as specialist assessments for colleagues to support OH advice and workshops for managers and HR Representatives.



## 16. Abbreviations and Acronyms

AFOM	- Associate of the Faculty of Occupational Medicine
CBT	- Cognitive Behavioural Therapy
CMO	- Chief Medical Officer
CRM	- Client Relationship Manager
DNA	- Did Not Attend (Appointment)
DPA	- Data Protection Act
DSE	- Display Screen Equipment
EAP	- Employee Assistance Programme
FFOM	- Fellow of the Faculty of Occupational Medicine
FME	- Further Medical Evidence
GP	- General Practitioner
PPQ	- Pre-Placement Questionnaire
HSE	- Health and Safety Executive
ICD	- International Classification of Diseases
IHR	- Ill Health Retirement
IMA	- Independent Medical Assessment
IP	- Intellectual Property
MFOM	- Member of the Faculty of Occupational Medicine
MR	- Management Referral
NWQ	- Night Workers Questionnaire
OH	- Occupational Health
OHA	- Occupational Health Adviser (Nurse)
OHP	- Occupational Health Physician (Doctor)
RIDDOR	- Regulating of Injuries, Diseases and Dangerous Occurrences Regulations
SLAs	- Service Level Agreements
UPPQ	- Unsatisfactory Pre-Placement Questionnaire
WR	- Work Related
WSA	- Work Station Assessment
WTR	- Working Time Regulations