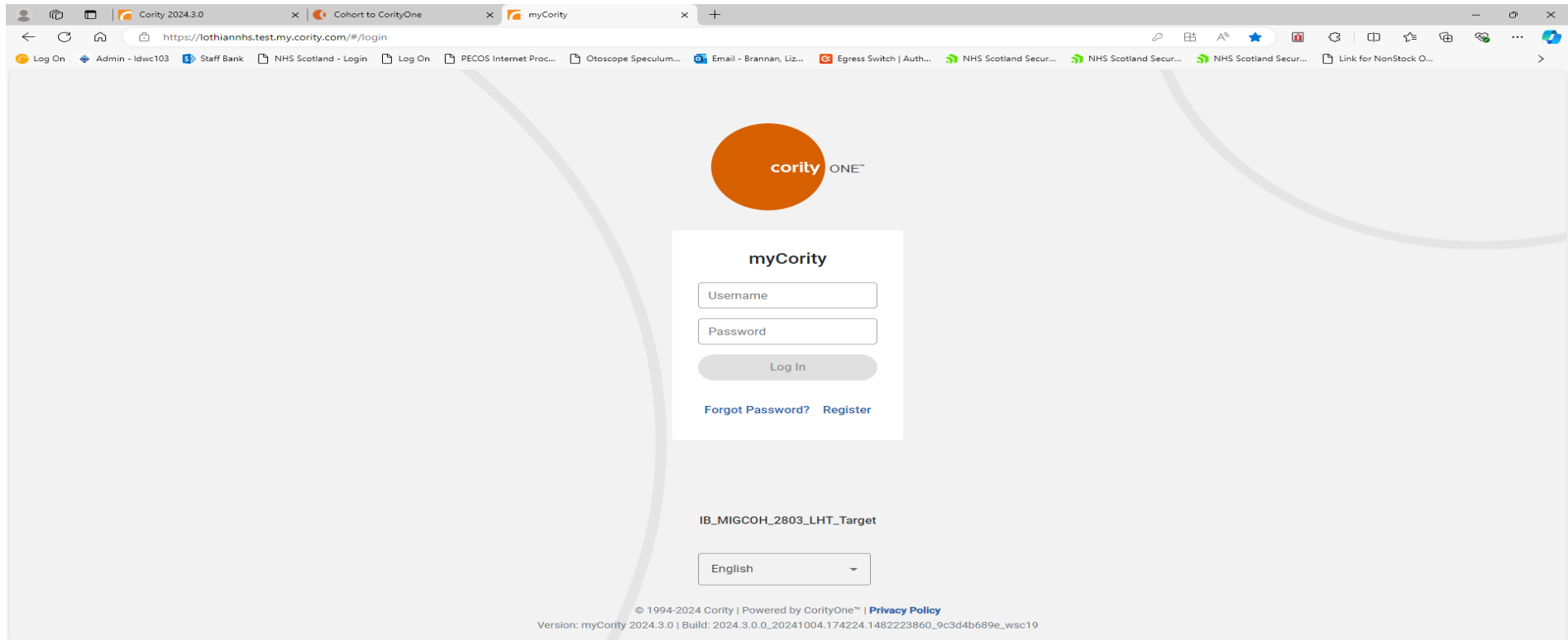


NHS Lothian Occupational Health

Guidance for Managers Submitting a Management Referral

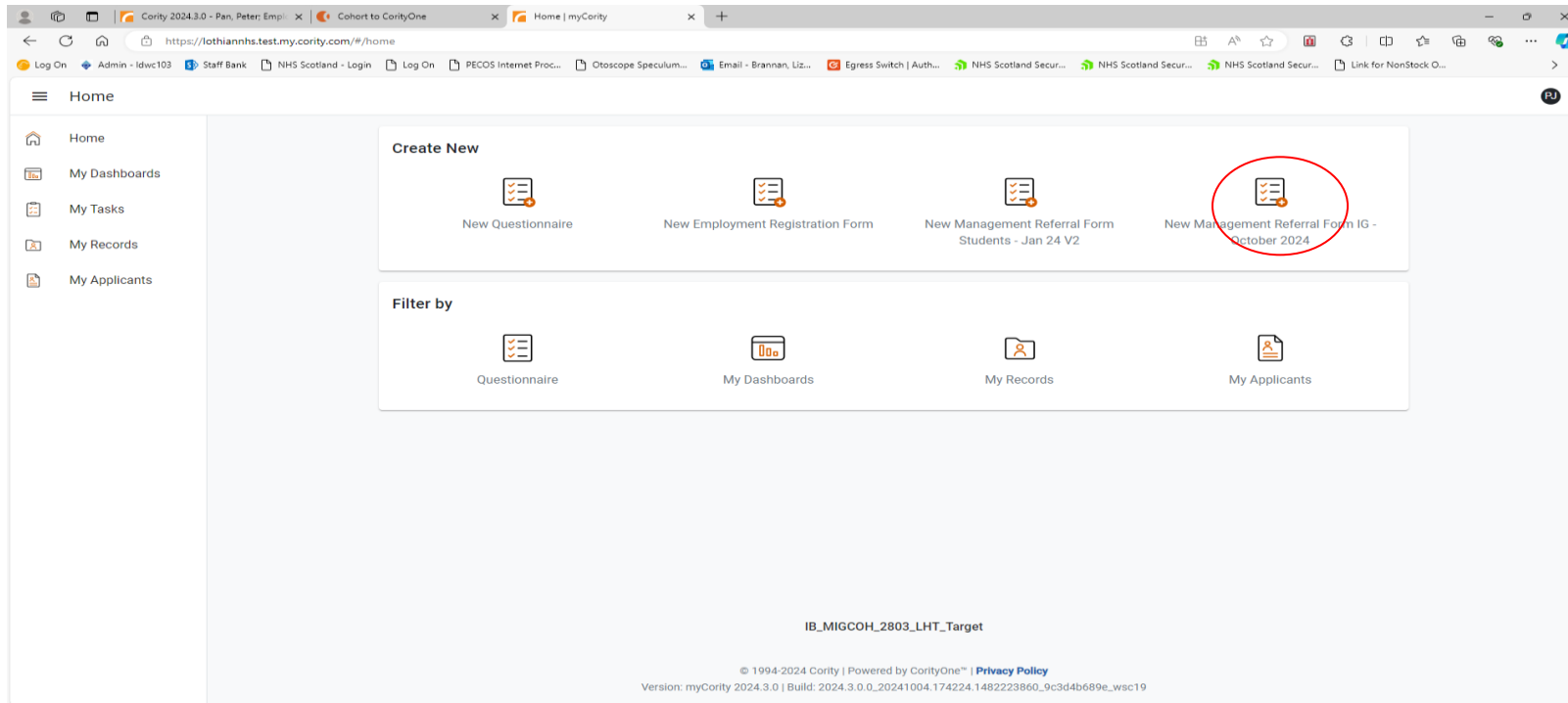
Log onto Cority <https://lothiannhs.my.cority.com/#/login>



Your username will be the same if you were registered on Cohort and transferred to Cority. One first log in please click on Forgot Password and reset your new one.

If you are a new manager, OHS will have set up you with a login and password and shared this via an email. Please log in with those details.

You will be taken to your dashboard which will look similar to below:



To start a new referral, click on the relevant icon or click on New Questionnaire and select from drop down. The questionnaire will open up. Start completing the form with your employees details. You will see that your own Cority name and number will appear as Manager in grey.

Management Referral Form IG - October 2024

PageID - COH-003605

Employee First Name \*

Employee Last Name \*

Employee Date Of Birth \*

dd/MM/yyyy

09/11/2000

Manager  
John, Papa (E129099)

Post Title  
Search for...

Employer  
Search for...

Department  
Search for...

Continue to complete the employment section, selecting from the drop downs.

Once done scroll down to complete the employee's contact details.

Once done scroll down to complete the Referral Information, this is a hidden question so click on right arrow to open up the section.

Once done scroll down to complete the Reason for Referral, this is a hidden question so click on down arrow to open up the section.

Continue to complete the remainder of the form.

Remember to upload the required attachments – Job Description and Sickness Absence Report, by clicking on the paperclip icon.

External Business users will be asked to provide a PO number or reference number for invoice.

Finally, you will be asked to complete the Online Application Declaration, see below. Select from drop down I AGREE

Cority 2024.3.0 - Pan, Peter: Emp... Cohort to CorityOne Management Referral Form IG - C

https://lothiannhs.test.my.cority.com/#/questionnaire/medicalpublicqrhstandaloneportal?questionnaireid=785

Log On Admin - Idwct103 Staff Bank NHS Scotland - Login Log On PECOS Internet Proc... Otoscope Speculum... Email - Brannan, Liz... Egress Switch | Auth... NHS Scotland Secur... NHS Scotland Secur... NHS Scotland Secur... Link for NonStock O...

My Tasks


Home My Dashboards My Tasks My Records My Applicants

Management Referral Form IG - October 2024 Cancel Delete Save Submit

22. Please tick if employee sickness record will be attached

23. ATTACHMENTS Hide Related Question(s) ▾

23.1. Add any attachments via the paper clip icon



24. Please provide a Purchase Order Number or reference number if you do not use Purchase Order numbers (failure to do so may delay in an appointment being generated):

PO 12234 8 / 4000

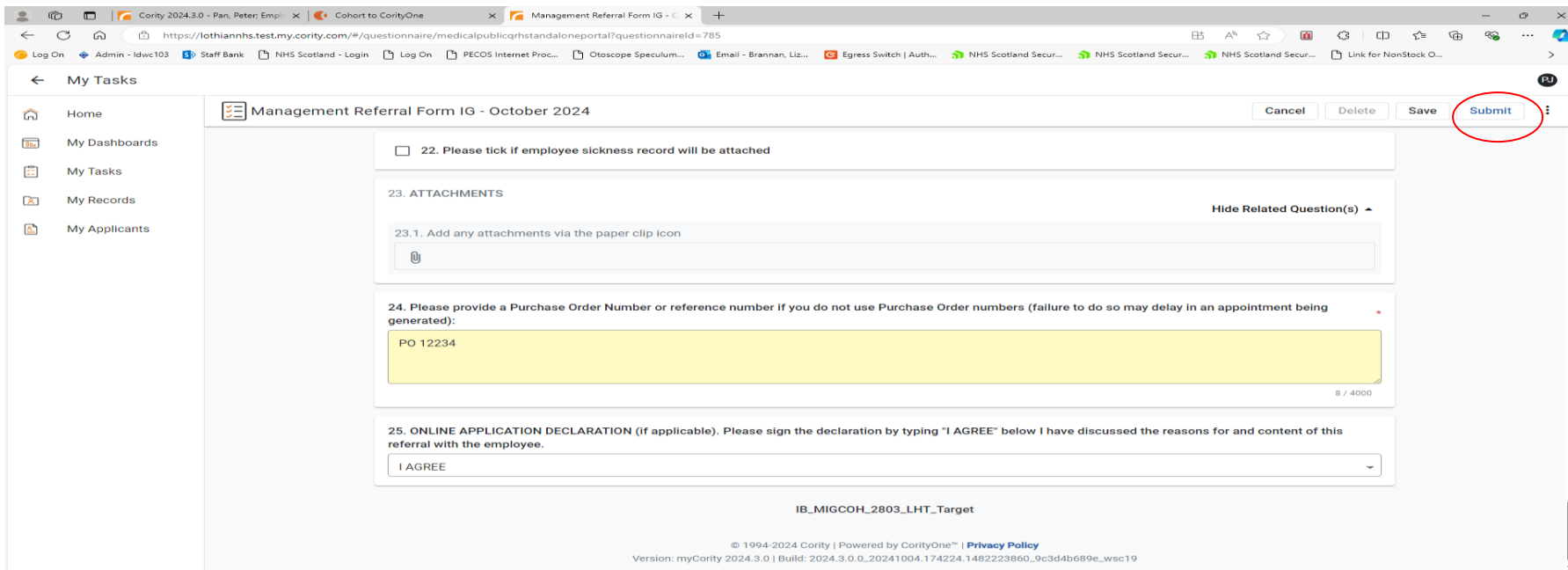
25. ONLINE APPLICATION DECLARATION (if applicable). Please sign the declaration by typing "I AGREE" below I have discussed the reasons for and content of this referral with the employee.

I AGREE

IB\_MIGCOH\_2803\_LHT\_Target

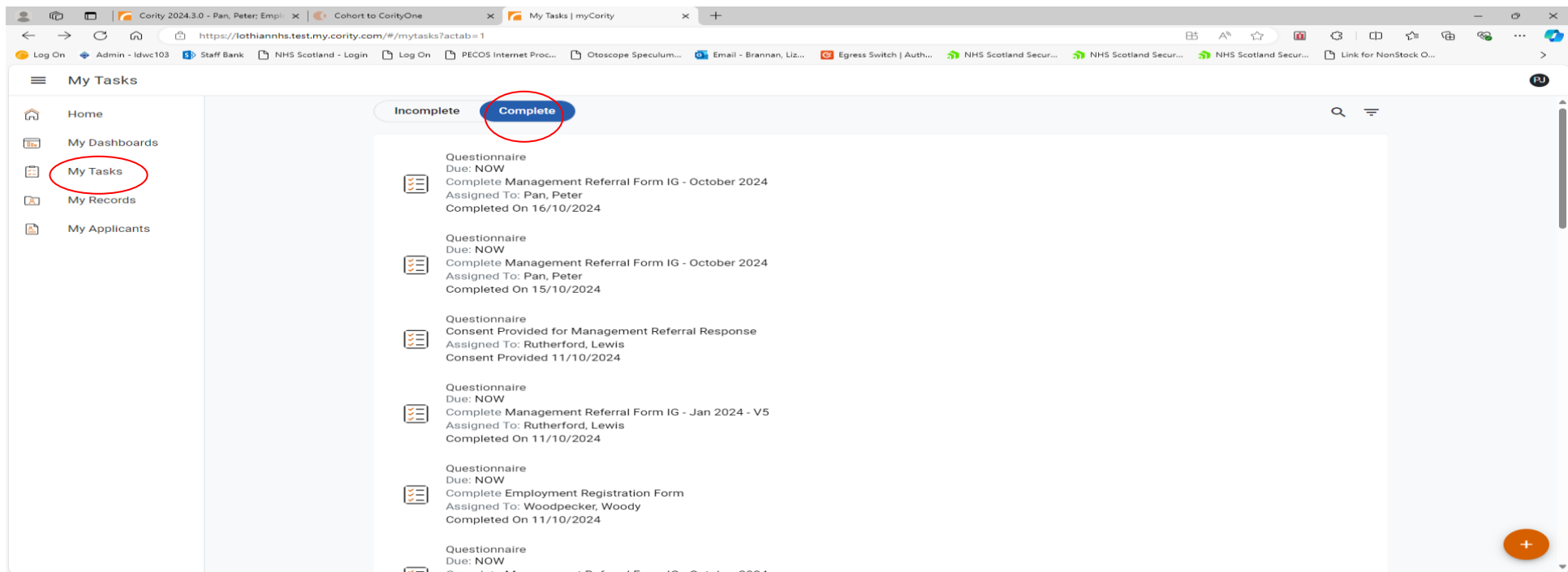
© 1994-2024 Cority | Powered by CorityOne™ | Privacy Policy  
Version: myCority 2024.3.0 | Build: 2024.3.0.0\_20241004.174224.1482223860\_9c3d4b689e\_wsc19

Once all completed, click on the SUBMIT button in top right hand corner



You will receive a pop up message advising you that your submission was successful.

Back on your dashboard you can look under My Tasks from left hand menu and this will offer you 2 options: Incomplete or Complete. Click on Complete and a list of questionnaires that you have submitted will appear.



If you click on My Records you will see the management referrals that are in progress with Occupational Health. Once OHS have seen your employee and issued you with a response form this is where you can locate it. Open up the employee's entry and click on Questionnaires Tab

My Records

Home

My Dashboards

My Tasks

My Records

My Applicants

Cority Case Form (MyCority)

Case Details Questionnaires Supervisor Messaging (MyCority Only)

Case Details

Employee  
Pan, Peter (E120123)

Case Number  
39927

Case Type  
Management Referral (COH-MANREF)

Case Status  
Book Appointment (02)

OHA/OHP  
OHP (02)

Priority  
High (01)

Practitioner

Management Referral

Share with Supervisor

Supervisor  
John, Papa (E120099)

Manager Name

HR Manager

Referral Reason  
LONG TERM SICKNESS ABSENCE (COH-2)

Case Referred By Group  
MANAGER (COH-2)

Referred Date  
17/10/2024  
DD/MM/YYYY

Received Date  
17/10/2024  
DD/MM/YYYY

You will see that there is your original referral plus the response questionnaire. Click on either the date or the questionnaire name to open it.

The screenshot shows a web browser window with the URL <https://lothiannhs.test.my.cority.com/#/record/CaseMaster/399277?actab=1>. The page title is "Cority Case Form (MyCority)". The navigation menu on the left includes "Home", "My Dashboards", "My Tasks", "My Records", and "My Applicants". The main content area is titled "Cority Case Form (MyCority)" and has tabs for "Case Details", "Questionnaires", and "Supervisor Messaging (MyCority Only)". The "Questionnaires" tab is active, showing a list of questionnaires. The list has a header "Case Questionnaires" and a table with columns "Date" and "Questionnaire". The table contains two rows: "16/10/2024" with "Management Referral Form IG - October 2024" and "17/10/2024" with "Management Referral Response - July 2024". The text "Management Referral Response - July 2024" is circled in red. Below the table, there is a pagination control showing "Record 2 of 12" and "Items per page 20". At the bottom of the page, there is a footer with the text "© 1994-2024 Cority | Powered by CorityOne™ | Privacy Policy" and "Version: myCority 2024.3.0 | Build: 2024.3.0.0\_20241004.174224.148223860\_9c3d4b689e\_wsc19".

Date	Questionnaire
16/10/2024	Management Referral Form IG - October 2024
17/10/2024	Management Referral Response - July 2024

You can also see from the screen below this is where you find the message/comments section to communicate directly to and from OHS regarding the referral.



Browser tabs: Cority 2024.3.0, Cohort to CorityOne, Cority Case Form (MyCority) | my..., Appointment Calendar

Browser address bar: https://lothiannhs.test.my.cority.com/#/record/CaseMaster/39927?actab=1

Browser tabs: Log On, Admin - Idwct103, Staff Bank, NHS Scotland - Login, Log On, PECOS Internet Proc..., Oscope Speculum..., Email - Brannan, Liz..., Egress Switch | Auth..., NHS Scotland Secur..., NHS Scotland Secur..., NHS Scotland Secur..., Link for NonStock O...

My Records

Home, My Dashboards, My Tasks, My Records, My Applicants

Cority Case Form (MyCority)

Case Details, Questionnaires, Supervisor Messaging (MyCority Only)

Questionnaires

Case Questionnaires

<input type="checkbox"/>	Date	Questionnaire
<input type="checkbox"/>	16/10/2024	Management Referral Form IG - October 2024
<input type="checkbox"/>	17/10/2024	Management Referral Response - July 2024

Items per page 20 1 - 2 of 2

Record 2 of 12

IB\_MIGCOH\_2803\_LHT\_Target

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Version: myCority 2024.3.0 | Build: 2024.3.0.0\_20241004.174224.1482223860\_9c3d4b689e\_wsc19