NHS Lothian Occupational Health

Guidance for Managers Submitting a Management Referral

Log onto Cority https://lothiannhs.my.cority.com/#/login
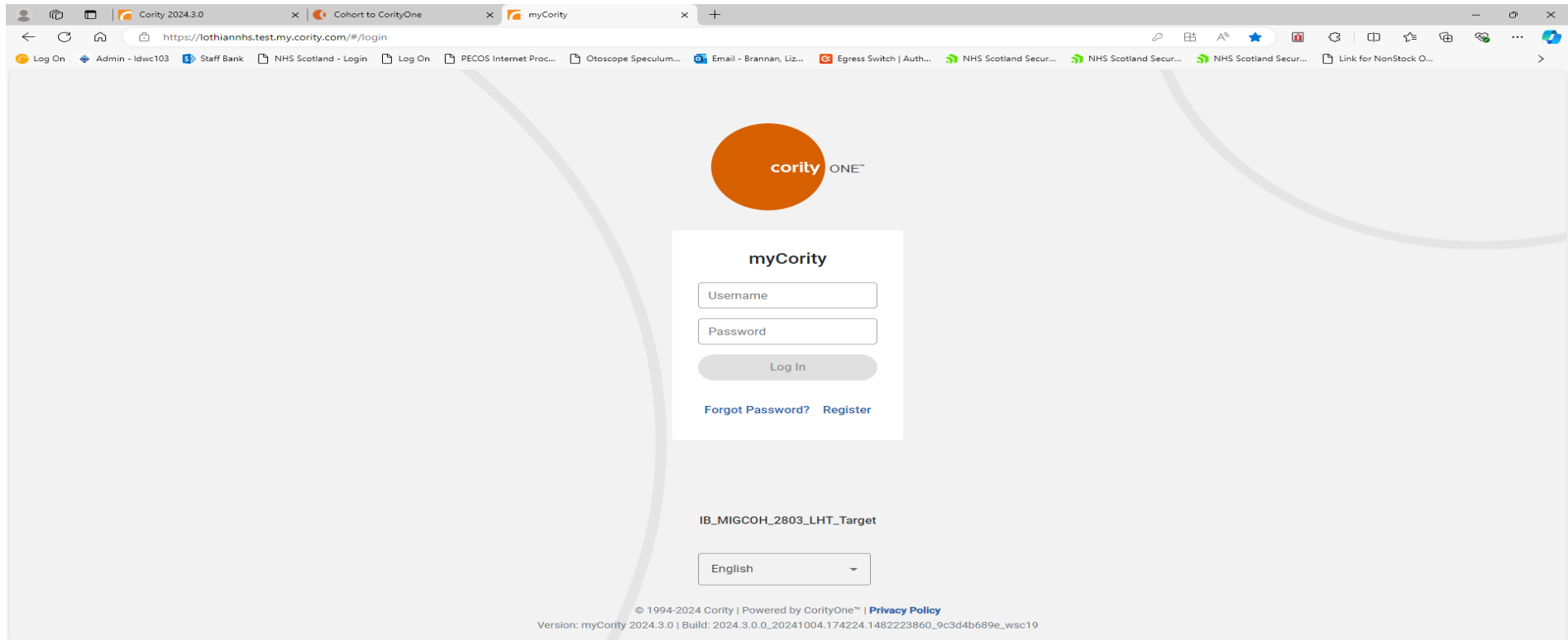
Your username will be the same if you were registered on Cohort and transferred to Cority. One first log in please click on Forgot Password and reset your new one.

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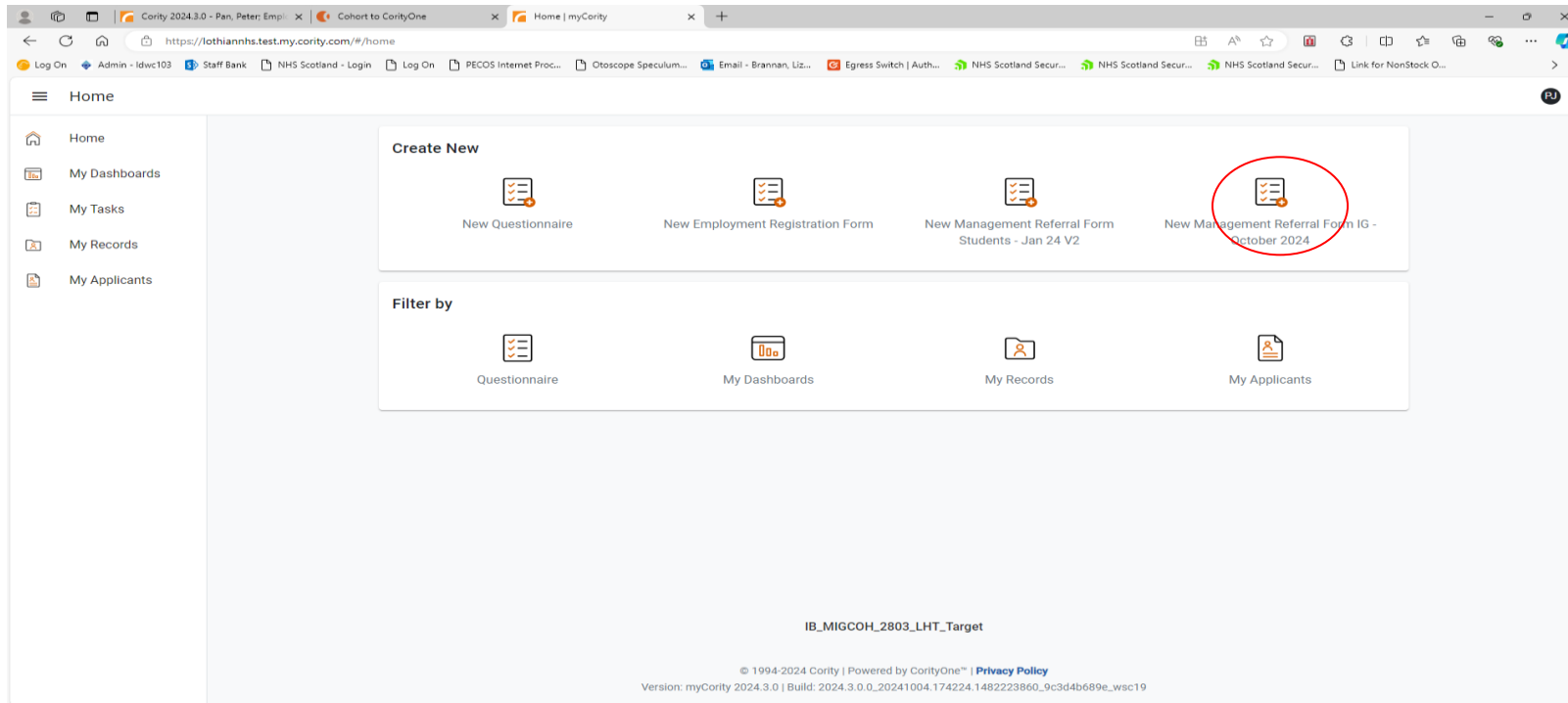
To start a new referral, click on the relevant Icon or click on New Questionnaire and select from drop down. The questionnaire will open up. Start completing the form with your employees details. You will see that your own Cority name and number will appear as Manager in grey.

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

Once all completed, click on the SUBMIT button in top right hand corner
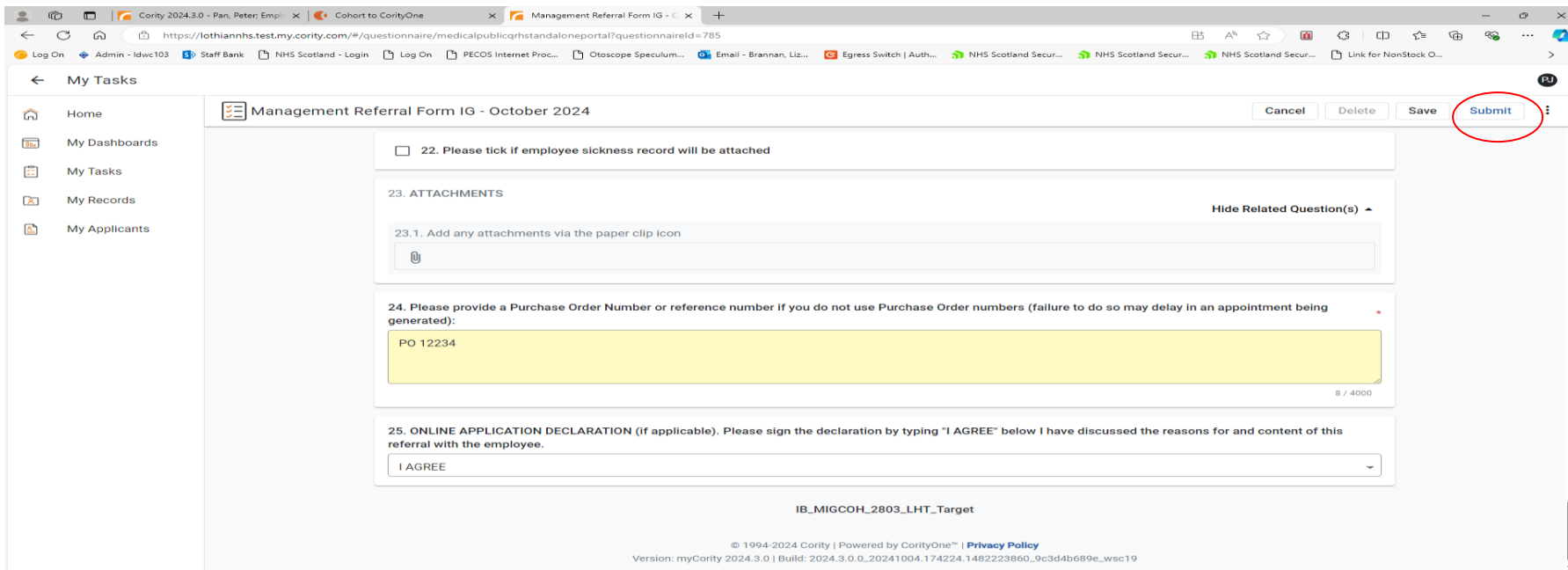
You will receive a pop up message advising you that your submission was successful.

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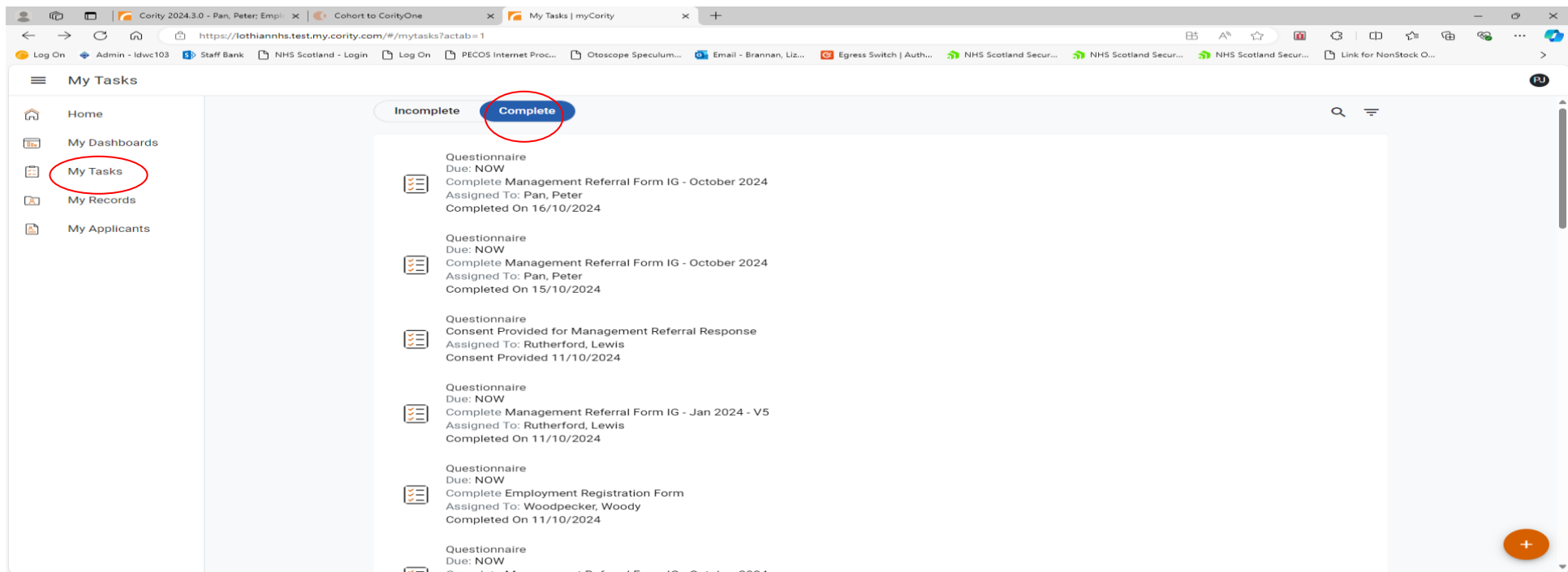
If you click on My Records you will see the management referrals that are in progress with Occupational Health. Once OHS have seen your employee and issued you with a response form this is where you can locate it. Open up the employee's entry and click on Questionnaires Tab

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.

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.

← My Records

Cority Case Form (MyCority)

Case Details   Questionnaires   Supervisor Messaging (MyCority Only)

Questionnaires

Case Questionnaires ▾

	Date	Questionnaire
☐	16/10/2024	Management Referral Form IG - October 2024
☐	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