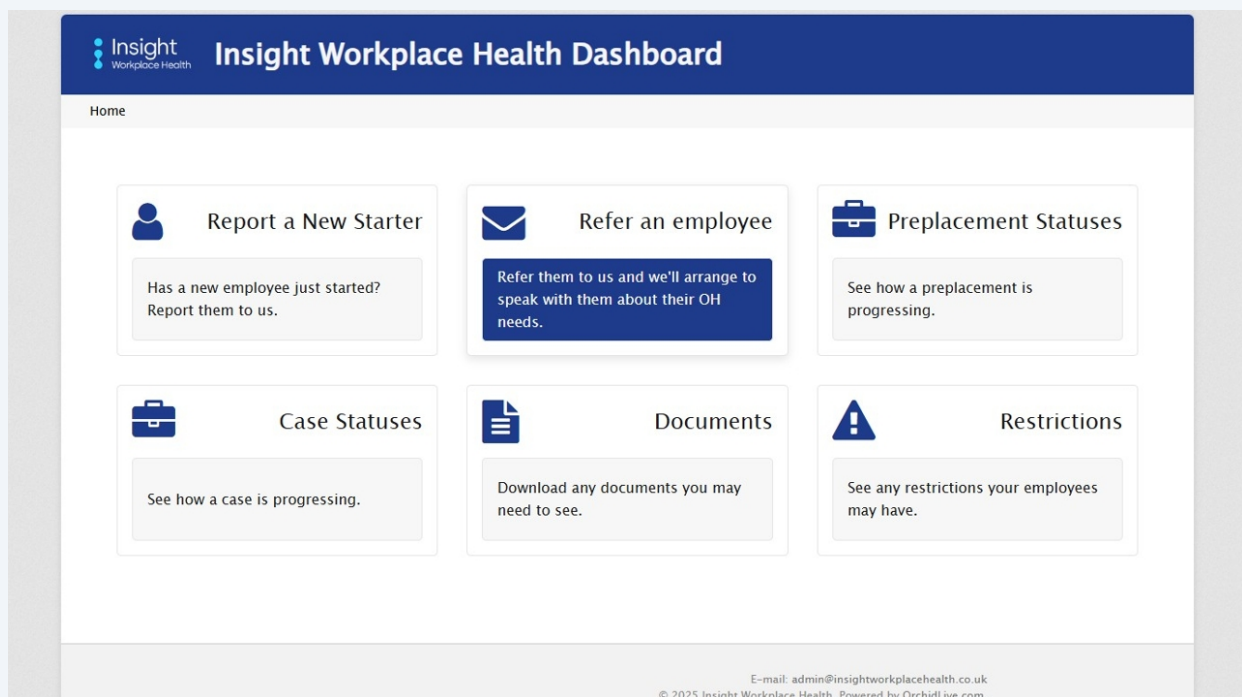


How to Refer an Employee - Life Coaching

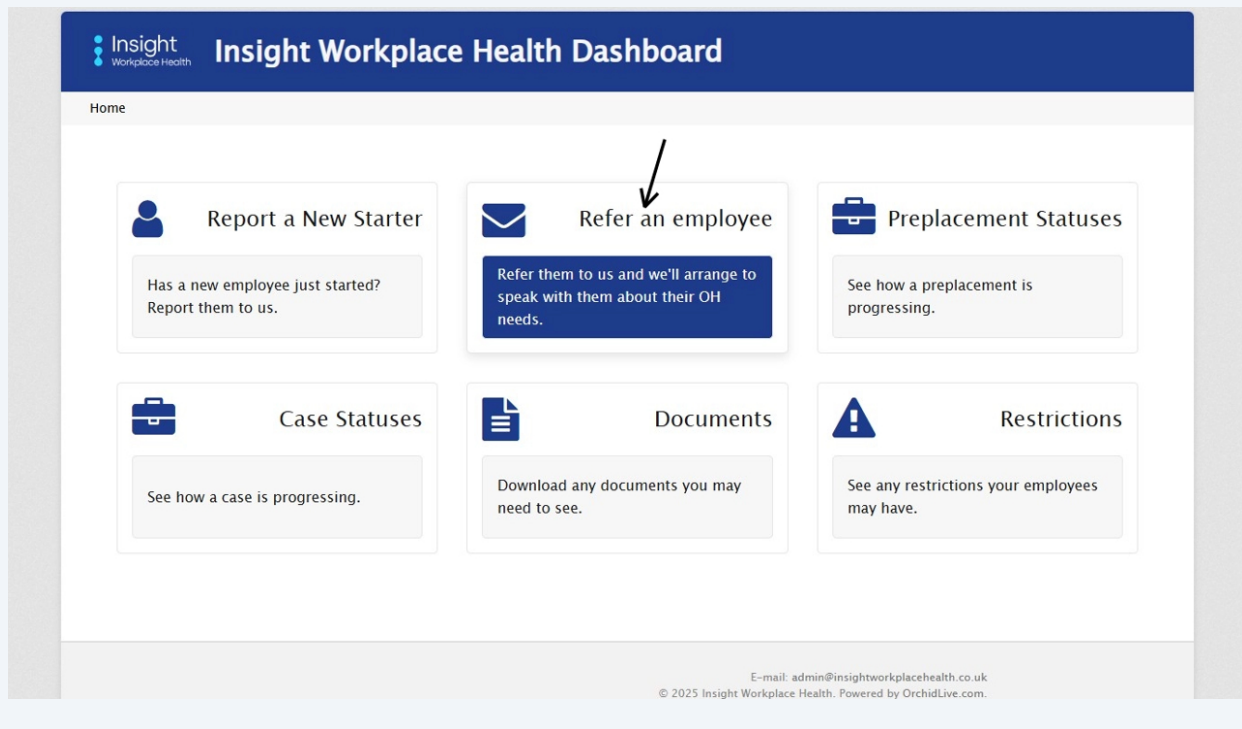
Follow this guide to learn how to refer an employee for life coaching.

1

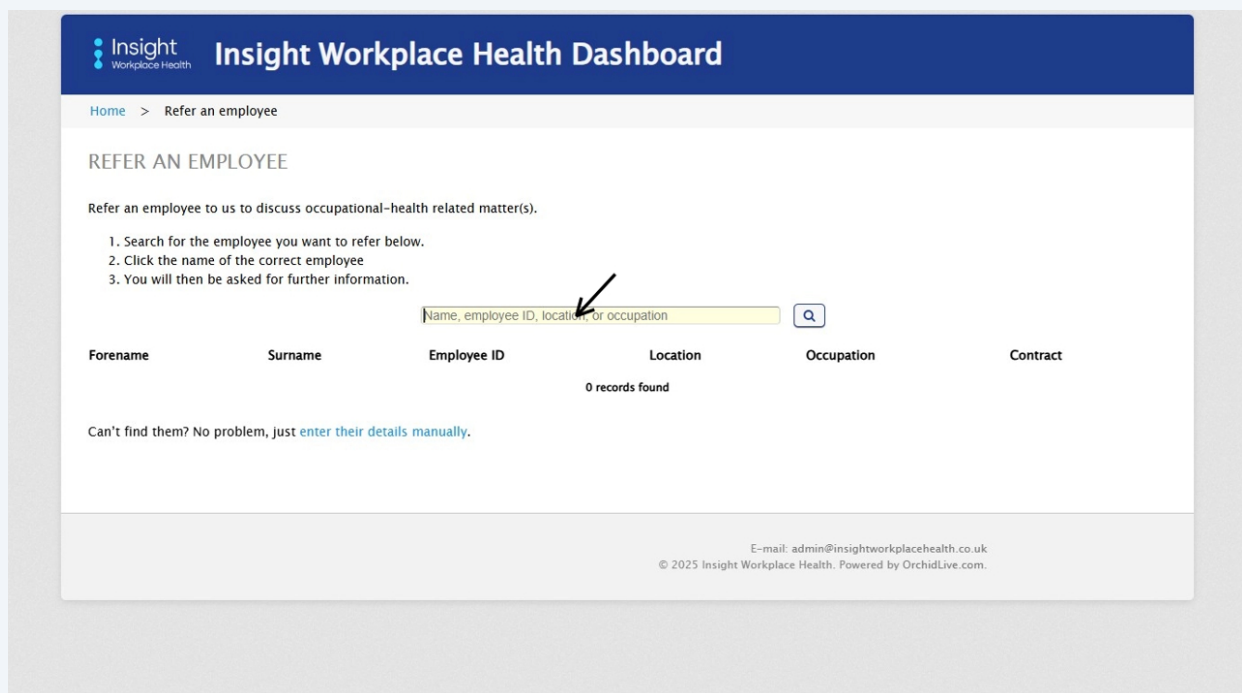
Navigate to <https://insight.orchidlive.com/orchid/dashboard/default/login> and login to view the dashboard below.



2 Click on "Refer an employee"



3 Search for the employee using the search box.



4 If the employee details are found, they will appear in a list below.

Insight

Workplace Health

Insight Workplace Health Dashboard

[Home](#) > [Refer an employee](#)

REFER AN EMPLOYEE

Refer an employee to us to discuss occupational-health related matter(s).

1. Search for the employee you want to refer below.
2. Click the name of the correct employee
3. You will then be asked for further information.

Forename	Surname	Employee ID	Location	Occupation	Contract
Callum	Test 1	49372694373			Demo Ltd
Emma	Test 1	43278271			Demo Ltd
Gable	Test 1	7654567745645			Demo Ltd
Millie	Test 1	8765536745325			Demo Ltd
Kieran	Test 1	453452343623532			Demo Ltd
Hayley	Test 1	879876856654			Demo Ltd
Isabelle	Test 1	878957566348			Demo Ltd
Micah Bass	Mcknight			Coremaking Machine Operator	Demo Ltd
Bryony	Mwgs	100898			Demo Ltd
TEST PPQ	PPQ			Fire Fighter	Demo Ltd
Drew Gibson	Battle		Test	Accountant	Demo Ltd
Demo PPQ	Demo		Demo	Admin & Clerical	Demo Ltd

12 records found

Can't find them? No problem, just [enter their details manually](#).

5 If the employee details do not appear in the list, click "enter their details manually"

Insight

Workplace Health

Insight Workplace Health Dashboard

[Home](#) > [Refer an employee](#)

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Drew Gibson	Battle		Test	Accountant	Demo Ltd
Demo PPQ	Demo		Demo	Admin & Clerical	Demo Ltd

12 records found

Can't find them? No problem, just [enter their details manually](#).

6 Continue to enter the referrer details first.

Insight Workplace Health Dashboard

Home > Refer an employee > Enter details

REFER A EMPLOYEE

Referrals to Occupational Health should be discussed with the employee being referred, they should be aware of the referral. Please complete all sections of the form in full; failure to do so may result in a delay to the referral and could potentially impact the quality/detail/relevance of the report.

All medical records are kept in accordance with the Access to Medical Reports Act 1998 as amended as well as all principles for processing data within the GDPR (EU) 2016/679 and the Data Protection Act 2018. The rights of the individual will be followed as legislation dictates.

Please ensure all personal details for the individual referred is correct and up to date to ensure GDPR compliance. Failure to do so may result in information feeding into the wrong employee record.

Note: Required fields are marked with an asterisk *.

Referrer Details

Full Name *
Job Title *
Department *
Telephone *
Email *

Basics

Title *
First Name *
Surname *

7 Continue to complete the form with the employee's information and contact details.

Basics

Title *
First Name *
Surname *
Gender
Employers ID *
Contract
Date of Birth *
Address
Postcode
Country

Contact

Home phone
Landline Number
Mobile Number *
Email Address *

Employment Details

Occupation
Purchase Order Number / Cost Code

8

Continue to answer yes or no to the referral information questions.

Employment Details

Occupation

Purchase Order Number / Cost Code

Referral Info

Is your employee's first language English? *

☐ Yes ☐ No

Does your employee have sufficient grasp of English (written and spoken) to engage fully in the requested occupational health consultation? *

☐ Yes ☐ No

Do you have an EAP (Employee Assistance Programme)? *

☐ Yes ☐ No

Does the EAP offer counselling services? *

☐ Yes ☐ No

Does the EAP offer Physiotherapy? *

☐ Yes ☐ No

Date of referral discussion with employee *

Please confirm that you have discussed the contents of this Occupational Health referral with the employee and gained consent to proceed. *

☐ Yes ☐ No

Failure to demonstrate this will result in the referral being rejected by the Occupational Health team. We cannot proceed with this referral unless the individual has given explicit consent

Referral Details

Please ensure you select the correct 'type of referral below'.

Management Referral: This option would be selected for a general referral for consultation about adjustments and/or fitness for role. Please call 01792 321010 if you are unsure of which type of referral to choose.

DSE: This option may be selected when advice is required on the correct set up of a desk/chair or similar workspace.

Ergonomic/Vehicle Assessment: This option may be selected when you need advise regarding adjusting the workplace to fit the employee.

9

Continue to type of referral and click "Life Coaching Referral" from the dropdown options.

Assistive Technology Support: This referral is in order to gain advice on recommendations for Assistive Technology in order to improve accessibility, enhance communication or offer tools to aid learning or work performance.

Life Coaching: Life coaching helps clients navigate significant life challenges, clarify their goals, and develop actionable plans to achieve their desired future. Coaches guide clients in creating strategies, staying accountable and offering a supportive and positive environment for progress.

Sharps Incident: Used to report and advise on incidents involving sharp objects such as needles or syringes, that can cause injuries or pose health risks.

Early Intervention Call: A short OHA call to establish nature of absence, signpost to assistance and to help facilitate faster return to work, where possible. NB this is not a full management referral.

It is important to note that the employee is entitled to withdraw consent at any stage of the process including for the report to be released to their employer even where the employer has paid for an OH consultation. The employee is under no obligation to provide consent for the final report to be released to the employer.

Type of referral *

0 attachments to this

Add attachment(s):

You may upload multiple files. Max file size 50.00MB.

10

Continue to answer the following question. Once completed you can add any supporting documents before clicking "send referral" to submit.

Early Intervention Call: A short OHA call to establish nature of absence, signpost to assistance and to help facilitate faster return to work, where possible. NB this is not a full management referral.

It is important to note that the employee is entitled to withdraw consent at any stage of the process including for the report to be released to their employer even where the employer has paid for an OH consultation. The employee is under no obligation to provide consent for the final report to be released to the employer.

Type of referral *

Life Coaching Referral

x

Life Coaching Referral

Background Information

0 attachments to this page

Add attachment(s): Choose files No file chosen

☐ Allow non-clinical users to see this files

You may upload multiple files at once; Current total size: n/a. Maximum total size 50.00MB.

Send referral