



Occupational Health User Guide

Clackmannanshire Council

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1.0 Introduction

Optima Health's occupational health services have the capability to deliver a range of benefits to the wellbeing of the Clackmannanshire Council, its partners and employees. To achieve these benefits Optima Health is committed to working in partnership with its customers.

The principal goal of Optima Health is to deliver an occupational health programme that equips managers with the tools and skills they need to manage the health of employees.

This document is designed as a reference guide for Clackmannanshire Council. It describes the arrangements available to assist with the management of health risks at all stages from pre-employment to retirement.

1.1 Glossary

Term	Description
myOHportal	Optima Health's secure online portal.
OH	Occupational Health
OHA	Occupational Health Advisor
OHP	Occupational Health Physician
GP	General Practitioner
Referring Manager	Individual that has created the referral for that employee
DNA	Did Not Attend
FME	Further Medical Evidence
SAR	Subject Access Request
CSA	Customer Service Advisor
BMI	Body Mass Index
FFT	Fit for Task
HAVS	Hand-Arm Vibration Syndrome
HS	Health Surveillance

1.2 Services

Product	Description
Online Referral Portal	Access to myOHportal, Optima Health's secure online portal. The portal functionality provides the ability for the referring manager to raise referrals, track progress and receive outcome summary reports, as well as many other features
Case Conference	A collaborative meeting to discuss a case to facilitate decision making and progression
Fitness for Task	An assessment to determine an individual's fitness to do their job role
Health Surveillance	An assessment to meet work regulation requirements
Immunisation	A programme of immunisation
Performance & Attendance Management	Service for advice about the management of an employee's sickness absence, attendance or concerns about general health in relation to their role
Pre-Placement	New employee screening for employees in both a non-safety critical and safety critical role
Pensions	A range of services for pensions products
Specialist Services	A range of specialist services including HAVs Tier 5

2.0 Occupational Health Online Platform

Referrals are submitted using myOHportal, which is accessed at the following address:

www.myohportal.co.uk

All referrals will be made by the Clackmannanshire Council referring manager/s. Optima Health will then process the referral to the appropriate intervention. Throughout the life of the referral, updates can be viewed in myOHportal by the referring manager and additional managers.

It is recommended that the user accesses myOHportal on a desktop or laptop and not a tablet or mobile device. myOHportal is supported by multiple browsers however, it is recommended that the user accesses myOHportal through Google Chrome. Web browsers must allow cookies and if a user's browser does not allow cookies, then an alert stating that cookies must be enabled in order to log in will be displayed on screen.

For further information on the myOHportal, please see the myOHportal section on this guide.

2.1 Using myOHportal for the First Time

2.1.1 Self-Registration

Referring managers using the portal for the first time should create an account. An account can be created by visiting www.myohportal.co.uk. This will direct you to the homepage of myOHportal. From here click Register New Account.

Your e-mail address	<input type="text" value="Enter Email"/>
Your password	<input type="password" value="Enter Password"/>
	<input type="button" value="Login"/>
	I have forgotten my password/pin
	Register New Account

This will then direct the user to a page where the registration details can be inserted. Please note, all fields noted with an asterisk (*) are a mandatory requirement to create an account. Once all fields are completed you can click 'create';

Enter Registration Detail

<p>Title *</p> <input type="text" value="---Please Select---"/>	<p>Job Title *</p> <input type="text"/>
<p>First Name *</p> <input type="text"/>	<p>Last Name *</p> <input type="text"/>
<p>Email Address *</p> <input type="text"/>	<p>Confirm Email Address *</p> <input type="text"/>
<p>Customer Identifier *</p> <input type="text"/> <p style="font-size: small; margin-top: 5px;">The Customer Identifier must uniquely identify the employee within your organisation e.g. Staff ID, Payroll number</p>	<p>Primary Contact Tel *</p> <input type="text"/>

Security Details

<p>Security Question *</p> <input type="text" value="---Select Security Question---"/>	<p>Security Answer *</p> <input type="text"/>
---	--

Captcha

Make sure you are human *



[Refresh captcha](#)

Please enter the same as showing

A temporary password and pin will then be emailed across to the email used in the registration process. Once the user had logged on using this temporary password and PIN (and their security question) the system will then request the user to create a memorable password and a six-digit PIN number. Both the password and 2 random digits of the PIN number are then required at every log in.

To ensure a successful registration, it is suggested that users type the temporary password rather than using a copy and paste function.

2.1.2 Pre-Registered Accounts

For any accounts that are pre-registered by another user (either by Optima Health or by User Administrators within your organisation), the user (account holder) will receive a temporary password via email. The temporary PIN is provided to the account creator and not the user themselves. The account creator should then pass the temporary PIN to the account holder via a method other than email. Once the user has obtained the PIN from the individual who has created the account, the user can log on to the

system. The system will then request the user to create a memorable password and six-digit PIN number. Both the password and 2 random digits of the PIN number are then required at every log in.

2.2 Logging on with a Previously Created Account

To log in to myOHportal navigate to www.myohportal.co.uk. The user will need to enter their username (this will be the email address registered with the account) and password that was created by the user. Once this is entered select 'login' and the user will be directed to the pin verification page. The user is then required to enter the two random digits requested from their 6-digit PIN and select submit. The user will then be directed to the home page.

It is recommended that the password is typed instead of using the copy and paste function. If incorrect login details are entered six times the user account will become locked. There is a self-unlocking process. The user should then select the forgotten password option and enter their email address. An email will then be sent with a reset password link. Within this they will be prompted to answer the security question that the user selected in the registration process.

If the above step has been completed and the user is still having difficulty accessing their account, please contact the helpdesk.

2.3 Creating Accounts

To create a new account for a user within the organisation the user is required to have 'User Administrator' access.

The following accounts can be created by a User Administrator;

- Case Coordinator – This allows the user to make referrals and view other referrals which have not been created by the user
- Manager - access allows the user to create referrals and only see the referrals they have created, unless they have been named as an additional referring manager when another user is creating a referral for an employee.

NB: If a Case Coordinator also requires permissions to make referrals, they will need both Case Coordinator and Manager permissions adding to their account.

New user accounts can be created by logging onto myOHportal and selecting records, customer, Clackmannanshire Council, customer accounts and create new customer user.

User Administrator access can only be granted by Optima Health. To request a new User Administrator account, please contact the helpdesk.

Note: The new user's PIN will display when creating the account. The user administrator (user creating the account) is required to provide this PIN number to the new user. The new user can then follow section 2.1.2 to log in to their account.

A guide to creating accounts can be found below.



Creating New User
Accounts Guide.pdf

2.4 What can myOHportal be used for

- Making referrals to occupational health
- Viewing previous referrals made through myOHportal (with appropriate permissions)
- Submitting and tracking referral documents
- Viewing referral progress and history
- Viewing real time updates to referrals
- Instant access to download interim and final reports as soon as they are produced.

3.0 Contacting Optima Health

3.1 Customer Service Helpdesk

The customer service desk is based at the Optima Health Glasgow office and is available from 9am to 5pm Monday to Friday (excluding Bank Holidays).

0844 9800 427

Email: Clacks@optimahealth.co.uk

The customer service help desk can be contacted to give assistance on; myOHportal, tracking cases and general pre-employment and pre-referral advice.

4.0 Types of Delivery Model

4.1 Telephone Appointments

Telephone consultations need to take place in a quiet and private environment, where the individual feels free to discuss their current situation away from disruption. These cannot take place in an open plan office where other staff are nearby. If the telephone consultation is arranged when the employee is at work, advance arrangements should be made by the referring manager to ensure the employee is available and within the correct environment for the telephone consultation to take place. Alternative contact telephone numbers can be supplied on the referral form, if required.

Optima Health will continue to progress the referral and provide updates to the manager until no further intervention is required or appropriate. At the telephone assessment stage, there could be the following possible outcomes:

- Onward routing to further interventions
- Did not attend
- Referred onto third party
- Outcome Summary Report
- Further Medical Evidence

4.2 Face to Face Appointments

Face to face appointments occur in a pre-arranged location whereby the employee will have an appointment with the practitioner in person. The duration and requirements of the screening will vary, dependant of the appointment type. It is also important to note that not all OH services can be delivered at each location on the table below.

Client Location	Address	Postcode
Alloa Business Centre	Alloa Business Centre, The Whins, Alloa	FK10 3SA

Optima Location	Address	Postcode
Optima Health - Glasgow	Ca'd'oro Building, 45 Gordon Street, Glasgow	G1 3PE

5.0 Arranging Appointments

5.1 Online Booking

If the service is eligible for online booking, following the creation of the referral the system will ask the user to proceed to schedule an appointment with a practitioner. To book an appointment online the referring manager can;

- Select proceed to open the referral information
- Select 'Click Here to Book an Appointment'
- Select an available time slot.
- Select continue
- Review the booking details and confirm they are correct
- If the booking details are correct the referring manager can then select confirm.

If the referring manager has selected that the employee would like to receive SMS correspondence this will be sent once the referring manager has completed the appointment booking online. A correspondence letter will also be sent to the employee's correspondence address.

A step by step guide can be found in the below icon.



Online Booking
Guide.pdf

5.2 Tele-Scheduling

Tele-scheduling will be conducted by administrators to agree a suitable appointment date and time with the employee with the aim to reducing appointment DNAs. Once an appointment has been booked the referring manager will be notified. Tele-scheduling can take place between the hours of 9am to 5pm Monday–Friday. Optima Health will attempt to call the employee three times to arrange the appointment and if they are unable to make contact, this will be escalated back to the referring manager via the portal to confirm they wish to continue with the referral. If no response is received within 10 working days, the referral will be withdrawn automatically.

5.3 Scheduling Escalations

If an employee refuses to arrange an appointment, makes the process of booking an appointment unduly difficult, or the contact number provided for the employee is incorrect, the referral will be 'escalated' back to the referring manager. The manager will be informed by email that they have a manager escalation task and will be prompted to log onto myOHportal.

The referring manager can view any manager escalation tasks by selecting my task reports on the left-hand side of the landing page and then selecting the task. Information to why the referral could not be completed will be found within the comment box at the bottom of the page.

If the employee decided to withdraw consent the comment will inform the referring manager and request them to discuss this with the employee. If the referring manager speaks to the employee and they still fail to engage with occupational health, then the referring manager can select to close intervention and withdraw referral. This will completely withdraw the referral so no further processing will occur.

If this task occurred due to incorrect employee details, the referring manager can then edit the employee details at the top of the management task. Once updated the manager can select re-book referral at the end of the page.

Should an employee fail to attend (referred to as a DNA) a scheduled appointment the referring manager is asked to discuss with the employee the reason for non-attendance. Following discussion with the employee if a further appointment is required, the referring manager should indicate this within the manager escalation task.

Management task escalations have a 10-working day time-out for the manager to select the action to take place, otherwise the referral will withdraw. If no contact is made with Optima Health within 10 working days, the referral will be automatically withdrawn, and no further action will be taken unless the employee is re-referred. However, if the referring manager needs further time, they can put the task on hold for up to 28 days. To do so select put the task on hold and select yes and then enter the reason you would like to put the task on hold.

5.4 Cancellations

If an employee wishes to cancel an appointment, they must contact the referring manager, who will contact the customer service helpdesk to reschedule or withdraw the referral. The exception to this is pre-employment assessments where the prospective employee can cancel and rearrange the appointment. This can be arranged through the customer service helpdesk.

6.0 Referrals

6.1 Creating a Referral

Referrals are submitted using myOHportal. To raise a referral the referring manager needs to;

- Select log a new referral on the landing page
- Select the service line they require, for example Fit for Task
- Select submit
- Select the specific intervention they require and select submit again.
- The referring manager can then progress through the referral form and submit the referral.

If it is a requirement for another user to be updated on the progress of this referral the referring manager must select an additional manager within the referral details page. This can only be achieved if the additional referring manager has a myOHportal account. If the employee has pre-existing open referral the system will alert the referring manager that there is already an open case for the employee.



Creating a Referral - Performance and A- HS example guide.

6.2 Obtaining Consent

Written consent is not required to refer an employee to occupational health. The referring manager must however inform the employee that they are being referred to OH, the reason for the referral, and what to expect from the process, including details of the advice being sought and how it may be used.

To confirm to Optima Health that the referring manager has met their obligation to tell the employee about the referral, the consent declaration box should be checked at the end of the referral form.

Verbal informed consent is confirmed in any subsequent consultations with Optima Health clinicians.

Where written consent is required to approach the employee's GP or specialist, Optima Health will obtain this.

6.3 Employee's Right to Refuse Consent

The employee has the right to:

- Refuse to engage with Optima Health at any stage. However, it is not in the employee's interests to refuse because if they do, their line manager will have to decide on the employee's future without the benefit of OH advice.
- Refuse to give consent to a report being sought from their GP or specialist.
- Refuse to provide consent to release any reports created by Optima Health.

6.4 Submission of Supporting Documentation

There are two ways to submit supporting documents;

- Upload as an attachment(s) with the referral form on myOHportal. This is the quickest, preferred and recommended way to provide supporting documents.
- By post to:
 - Optima Health (CLC)
 - Ca'D'Oro Building
 - 45 Gordon Street
 - Glasgow
 - G1 3PE

6.5 Tracking Referrals

Throughout the life of the referral, updates can be viewed in myOHportal. The referring manager will receive an email with a link to the portal each time a referral has been updated.

If you wish to track the progress of a referral this can be achieved by;

- Logging on to myOHportal
- From the landing page, select actions on the top navigation bar
- Select all referral search
- Search for the referral by entering the referral ID. If the user does not have the referral ID, they can select to search for the referral under other search parameters and search for the employee under their name.

Once the user has searched for the referral, they can then view the referral dashboard (with appropriate permissions) by clicking the referral number on the left of their details. If the referral number is not viewing as a blue link this means that the user does not have the appropriate permissions to view this case. The referral dashboard includes information regarding any appointments that have been booked or completed for this referral. For a more in-depth history of the referral, select file notes on the top referral navigation bar.

6.6 Downloading Reports

When a report becomes available, an email notification will be sent to the referring manager. The email will prompt the referring manager to log in to myOHportal to view the report. Once logged into the portal the report can then be downloaded by;

- Clicking on the action page on the top navigation bar
- Select all referral search

- Enter the referral ID. If you do not have the referral ID, you can select to search for the referral under other search parameters and search for the employee by their name.
- Select the employee
- Select related actions on the top bar
- Select manage documents
- Select the report to download.

6.7 Quality and Audit

It is important to Optima Health that the reports that we provide meet your requirements. All reports should adhere to best practice guidance and be compliant with legislation.

Reports from Optima Health must enable management action and case progression. It is our expectation that the reports written by our practitioners will meet our quality standards on content and format, as set out below.

- Content – a professional, objective opinion
- Concise summary of relevant medical issues or that the issues are not primarily medical
- Are they fit for work (only required for Fit for Task Services)? Fit for work outcomes must be either fit, unfit or fit with restrictions/modifications
- What is the plan – prognosis, rehabilitation plan, expected progress and advice to manager on supporting case resolution - and how to manage any unexpected outcome
- Indication of likely timescale for the plan
- All managers questions are answered (maximum of 3 additional questions per referral) – if not relevant or appropriate then the report must explain why
- Separation of employee perception versus clinical opinion
- Summary recommendations – supported by medical evidence and providing a clear signpost for the manager to act
- Contact details included – to encourage clarification if needed
- Format – a professional, easy to read report
- Clear structure – use paragraphs for each key point
- Plain English – no jargon
- Short, sharp and to the point – no waffle
- Correct spelling
- Sentences that make sense – correct grammar and punctuation
- Concise summary – can use bullet points for clarity.

Before sending out reports, all practitioners check that they are delivering the Optima Health quality standard. An audit is undertaken on a sample of all practitioners' reports on a regular basis.

7.0 Services

7.1 Pre-Placement

7.1.1 Product Overview

General medical screening is required for all new employees or employees changing job roles. This product includes general pre-employment health screening (including pre-employment examinations where clinically indicated).

The purpose of a pre-employment screening is to provide pre-placement advice regarding suitability of applicant for employment and/or internal transfer, including advice on (but not limited to):

- The relevant UK disability legislation.
- Adjustments, necessary to ensure that the applicants can meet the requirements of their roles
- Individuals with a record of high sickness absence
- Adverse health issues (past and present)
- Current legislation
- Fitness for work
- Advice to enable Clackmannanshire Council to gauge the risk of high levels of sickness in future
- Advice on what action to take.

7.1.2 Assessment of the Pre-Placement Health Questionnaire

The health questionnaire will be emailed (if consent has been provided to communicate with the employee by email) or posted to the employee with information for the employee to complete online. This questionnaire will then undergo scrutiny either by auto clearance or manual scrutiny. There are three outcomes following the completion of the health questionnaire;

- Cleared as fit for the proposed duties
- Progress for further interventions
- Progressed to request further medical evidence

Following the above additional information being received the referral could then be cleared as

- Fit for the proposed duties
- Fit with adjustments
- Unfit

7.2 Performance and Attendance Management

7.2.1 Product Overview

Advice about the management of an employee's sickness absence, attendance or concerns about general health in relation to their role.

Advice from Optima Health will include the following:

- Fitness to return to work
- Limitations on full service on return to work
- Prognosis for further improvement or deterioration in health
- Recommendations for therapeutic intervention or lifestyle alteration
- The existence of a medical condition in repeated short-term absence cases
- Clarification and interpretation of all medical evidence following the conversation with the employee
- Reasonable adjustments
- Anticipated date of return to work
- Whether the relevant UK Disability legislation is likely to apply
- Working Time Regulations 1998, if appropriate

7.2.2 Referral Process

By ensuring that OH clinicians deliver a consistent output in terms of the OH Report, referring managers can be sure that the advice they require will be provided without having to ask for it.

Managers are permitted to ask up to three additional questions within the referral process. Managers are encouraged to provide relevant background information to help the OH clinician understand the circumstances of the employee being referred, including any adjustments they can and cannot accommodate.

The referral structure is split in to three key sections:

- Reason for referral
- Any managerial / workplace relationship issues
- Employee's current duties

Managers should provide clear, succinct information in these sections and they will be helped by ensuring that as much information as possible is obtained by 'one-click' in the drop-down options or tick boxes.

Where free text is required this will be focused so that managers don't have to repeat themselves or provide unnecessary information.

To ensure that the appropriate level of advice is obtained, referring managers should provide information on the following:

- Confirm management actions already undertaken
- Are there any organisational, disciplinary or work relationship issues?
- Has any rehabilitation or adjustments already been made?
- Include details of any failed rehabilitation plans
- What are the key aspects to the employees work currently affected?

7.2.3 Management Feedback Task

Once a Performance and Attendance referral has been completed, the referring manager/s will be sent a task where they can provide feedback on the report.

The referring manager will receive an email to inform them that they have a manager task and request for them to login to the portal. Management feedback tasks can be viewed by;

- Selecting my task reports on the landing page
- Click manager feedback task
- Select accept on the right-hand side of the top bar to progress the task
- Click the link to view the report
- Navigate back to the previous tab
- Select if the user is satisfied or unsatisfied with the report

If the referring manager selects that they are satisfied with the report no further action is required. If the referring manager has selected that they are not satisfied with the report, multiple options will be presented to inform Optima Health on why the report is not satisfactory. Once submitted the feedback will be reviewed by the administration team and they will take the appropriate and relevant actions to resolve the issue.

7.2.4 Issues with OH management reports

Problems with the content of the OH Report, that cannot be clarified via discussion with the practitioner who wrote the report, may include:

- The report does not fully explain the medical issues, for example does not offer relevant advice on interventions (e.g. physiotherapy) or lifestyle changes that may help in the improvement of the condition
- Advice is not in plain English or free of medical jargon
- Advice does not answer all appropriate questions asked or needs clarifying. This includes minor omissions and admin errors
- Medical advice seems contradictory and the report does not explain or justify this
- There are significant errors in the report, which means that the referrer is unable to take appropriate action, e.g. the report does not seem to refer to the person who was seen at the appointment

7.2.5 Considerations

Before asking for amended report, the referrer should:

- Decide if amended report will make a difference to how the case is managed
- Not delay in asking for amended report or they may have to make a new referral, this must be submitted within 10 working days of the assessment.
- Not ask for amended report because their opinion is different to the one given in the report by the OH Practitioner.

Note: Referring managers must not use the opportunity to ask additional questions. If the questions were not in the original referral, a new referral is required. Should clarification regarding the content of a report be required, the practitioner who wrote the report may be contacted upon the number provided within the report.

7.2.6 Process of Amending Reports

If the practitioner needs to speak to the employee for consent to make the change or to collect extra information, they will attempt to contact them directly or arrange for an appointment to be made preferably on the same day or within 24 hours. If original practitioner who wrote the report is not available, the case will be taken on by another practitioner.

The process should be completed the same day or at the latest within 24 hours depending on the availability of the employee and/or consent being obtained. The amended report will be uploaded, and the manager informed via a management feedback task on the portal.

7.3 Fit for Task

Periodic fitness for task medical screening is required determine the individual is fit to conduct their job role. The health questionnaires relating to the fitness for task screening will be emailed to the employee for completion. If Optima Health do not hold the employees email address, then a link to the health questionnaire will be posted to their address. Optima Health provide the following fitness for task services and appointments times are;

- Group 2 Driver Medical
- Night Worker – Employee questionnaire
- Asbestos Post Exposure Medical

7.3.1 Group 2 Driver Medical

A FFT medical that includes a health questionnaire and medical screening elements.

Screening elements include:

- Blood Pressure
- Vision

Please select this medical if you have any HGV drivers.

7.3.2 Night Worker Assessment

A night worker questionnaire for employees whose role requires a health assessment to meet the requirements of the Working Time Regulations. The night worker questionnaire is to be completed by the employee and cleared through auto-scrutiny and where clinically appropriate routed for manual scrutiny and if required an OHA telephone consultation.

7.3.3 Asbestos Post Exposure Medical

A FFT medical that includes a health questionnaire and medical screening elements.

Screening elements include:

- Spirometry
- Chest exam

7.4 Health Surveillance

7.4.1 Health Surveillance Assessment

Health surveillance for employees whose roles involve potential exposure to noise, respiratory and skin sensitisers and vibrating tool. A face to face appointment that includes a health surveillance questionnaire to be completed by the employee beforehand, which is clinically scrutinised by the clinician at the time of the appointment. Appointments are scheduled for 40 minutes.

Screening elements includes;

- Audiometry
- Spirometry
- Skin Assessment

7.4.2 Audiometry

Health surveillance for employees whose roles involve potential exposure to noise. A face to face appointment that includes a specific audiometry questionnaire to be completed by the employee beforehand, which is clinically scrutinised by the clinician at the time of the appointment. Appointments are scheduled for 20 minutes.

Screening elements includes;

- Audiometry

7.4.3 Respiratory

Health surveillance for employees whose roles involve potential exposure to respiratory sensitisers. A face to face appointment that includes a specific respiratory questionnaire to be completed by the employee beforehand, which is clinically scrutinised by the clinician at the time of the appointment. Appointments are scheduled for 20 minutes.

Screening elements includes;

- Spirometry

7.4.4 Skin

Health surveillance for employees whose roles involve potential exposure to skin sensitisers. A questionnaire is to be completed by the employee and cleared through auto-scrutiny and where clinically appropriate routed for manual scrutiny and if required an OHA telephone consultation.

7.4.5 HAVS Tier 1 and Tier 2

A HAVS Tier 1 or 2 questionnaire is to be completed by the employee and cleared through auto-scrutiny and where clinically appropriate routed for manual scrutiny and if required an OHA telephone consultation.

7.4.6 HAVS Tier 3 and Tier 4

HAVS Tier 3 referrals can be made through the portal, the administration team will then utilise tele-scheduling to book the appointment with the employee. Once the appointment is completed the practitioner will issue a report to the referring manager. On referral of a HAVS Tier 3 appointment if the practitioner believes that the employee requires a Tier 4 assessment, they will route this for a follow-on intervention of a HAVS Tier 4, an interim report will be generated to the referring manager.

7.5 Specialist Services

7.5.1 HAVS Tier 5

HAVS 5 referrals can be made through the portal, the administration team will then utilise tele-scheduling to book the appointment with the employee. Once the appointment is completed the practitioner will issue a report to the referring manager.

7.6 Pensions

All pensions referrals can be made through myOHportal. Referrals are then completed using the Local Government policies.

7.0 Employee's Right to Prior Sight of Reports

Following an assessment, the Optima Health Practitioner will consider all the information provided and complete an OH report. Employees are offered prior sight of the report before their OH report is sent to the referring manager. Employees are given three options with regards to their OH report;

- Prior sight required – employees are given 7 working days to request amendments or refuse consent for the report to be released. Employees are also able to request a further 7 working day extension. Managers will be informed accordingly
- Copy of report required – OH report released immediately to the referring manager and the employee receives a copy at the same time
- No prior sight required – Report will be release to the manager immediately

The advice provided by Optima Health in OH reports is impartial. At the time of the consultation, employees have the right to ask for a report to be amended if they believe that the detail within the report is incorrect or misleading. However, the decision whether an amendment to the report is appropriate will be a clinical decision and at the discretion of the practitioner. The professional opinion would not be changed.

8.0 Further Medical Evidence

8.1 Overview

The Optima Health clinician may need to contact an employee's GP, Specialist or Consultant for additional information before giving an opinion. Obtaining Further Medical Evidence (FME) will ensure that advice provided is based on current and accurate medical information and we will only request FME where it is likely to add significant value to the advice given.

FME may be required from a GP, Specialist or Consultant in the following circumstances:

- Ill Health Retirement (IHR);
- Support in confirming fitness for task; or
- Specialist advice in complex or legal cases.

All procedures will comply with the requirements of the Access to Medical Reports Act 1988.

8.2 Process

If the clinician identifies the need for additional medical evidence, an FME request will be sent automatically to the relevant parties via the portal. Consent will be gained at the time of making an FME request. The request will be time monitored at regular intervals to ensure a swift response and the total time allocated for a response is 20 working days before the case will be progressed.

The referring manager will be informed when the FME is requested and updated and will be advised on what further actions and interventions are recommended following the request.

On receipt of the FME the requesting practitioner will be notified. They will review the referral and produce a report and/or advice on next steps.

9.0 Access to Medical Records

Individuals have a right under the Access to Medical Reports Act 1988 to access medical reports prepared by any registered medical practitioner who is, or has been, in charge of their clinical care. 'Clinical care' means anyone who has examined, carried out investigations or diagnosed for the purposes of, or in connection with, any form of medical treatment.

Individuals also have several statutory rights under the Data Protection Act 2018. Organisations that control personal information must comply fully with the Data Protection Act.

Under the Data Protection Act, individuals can ask to see the information about themselves that is held. These requests are known as 'Subject Access Requests'.

9.1 Subject Access Requests (SAR) to a medical report by an individual

If an individual (data subject) wants to see their personal data that Optima Health holds this can be achieved by any form of communication. If the requester makes a SAR over the phone it is important to note that Optima Health will likely require additional proof of identity, and it may be requested that the data subject provides additional information via email.

0844 9800 427

Clacks@optimahealth.co.uk

Optima Health (CLC)

Ca'd'oro Building

45 Gordon Street

Glasgow

G1 3PE

To complete a SAR the individual needs to ensure that the following information is provided:

- Full name
- Date of birth
- Contact details
- Company they are employed by
- Details of the document/s that are being requested

9.2 3rd party requests

Requests can be made from third parties, e.g. solicitor for an employee. Third party requests may be deemed as a SAR or an access to medical records request dependant on the content of the request. Requests will only be processed with consent from the data subject.

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To complete a SAR the third party needs to ensure that the following information is provided:

- Data subject's full name
- Data subject's date of birth
- Data subject's contact details
- Third party contact details
- Company the data subject is employed/previously employed by
- Details of the document/s that are being requested
- Signed authority by data subject to release information to third party

11.0 Complaints and Compliments

The customer service desk is the first point of call for any complaints or compliments and can be contacted on 0844 9800 427 or via email to, Clacks@optimahealth.co.uk

The Customer Services Advisor (CSA) should be able to deal with and resolve many complaints under processes like amended reports or issue resolution. If the complaint cannot be resolved, the CSA will complete a complaint form with the complainant over the telephone and escalate where appropriate. Once completed a copy of the completed form will be sent to the complainant by post and to the Optima Health quality team. If the complainant would prefer to complete the form, the CSA will post or email a copy of the form to them to be returned to Optima Health by post.

The Service Delivery Manager will co-ordinate all complaints to ensure they are fully responded to and that any lessons learned can be applied.

12.0 Medical Ethics and Confidentiality

Advisers in occupational medicine have the same ethical responsibilities as Advisers in other branches of medicine. The General Medical Council and the Faculty of Occupational Medicine determine the ethical guidelines.

Also, OH Practitioners are responsible for the occupational health of all employees, not just the individual concerned. As the employee is normally a patient of another doctor (i.e. a GP), OH Practitioners must be particularly careful in their relationships with their professional colleagues.

All Optima Health OH medical staff must conform to the highest standards of professional conduct and rigorously follow the ethical guidance provided by the relevant professional bodies.

All our non-medical staff are contractually required to keep medical, personal and corporate information confidential.