



# **Client Service Guide for Co-op**



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## Introduction

Duradiamond Healthcare provide an independent, confidential occupational health service to Co-op.

Occupational health is dedicated to helping colleagues to keep well, and to help them work to their potential in spite of health problems. We know that work is an important ingredient of staying well, so helping colleagues to remain in work isn't just good for Co-op, it's good for colleagues.

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 individuals referred to our service.

As we handle personal and sensitive data, Duradiamond provide a secure online portal for you 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, including 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.

## 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 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 complex cases.

Duradiamond also ensures that wherever colleagues have access to additional services such as Employee Assistance Programmes, that we are integrating with these services and signposting colleagues 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, support for managers and other specialist services. Each of our clients has a bespoke portfolio of services included within our contract and these are agreed between your dedicated Account Manager and the 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 contact [HR\\_Wellbeing@coop.co.uk](mailto:HR_Wellbeing@coop.co.uk).

## Duradiamond Contacts

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 Alasdair Emslie	Responsible for overseeing the clinical service supplied to your employer and advising on your organisations strategic health plan.
Client Relationship Manager	Kerry Wellbourne-Smith	Responsible for overseeing the non-clinical aspects of the service and contractual agreements.
Administration Team	Team 4 01273 013679 <a href="mailto:team4@duradiamondhealth.com">team4@duradiamondhealth.com</a> Open Mon-Fri 9:00 - 17:00 (except bank holidays)	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.
CMO Advice Line	01273 013679 Call and ask to speak to the CMO line Open Mon-Fri 9:00 - 17:00 (except bank holidays)	CMO Line is available to all managers to get advice from an OH Practitioner. This can be speculative, relating to a potential case or a live case.

## 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:

- Identify colleagues who may be struggling at work (before they go off work) and seek a referral or use the CMO advice line.
- Take action early 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 important to avoid risk of further absence.
- We work with managers to create "accommodating" workplaces to support those with temporary or long-standing impairments or disabilities to work productively.
- Supporting managers in creating good quality and supportive working relationships with their team.



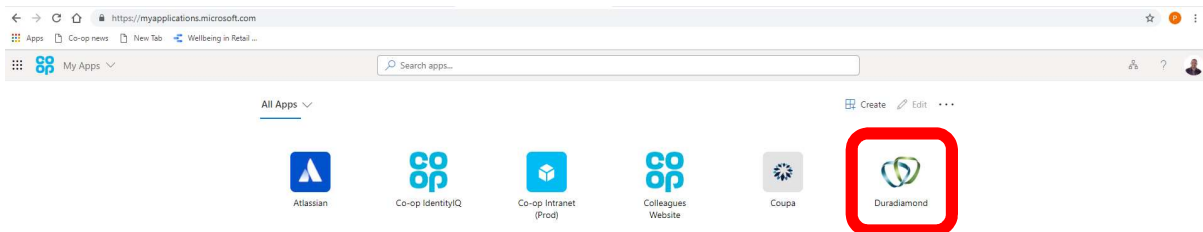
## Account Management

### Registration

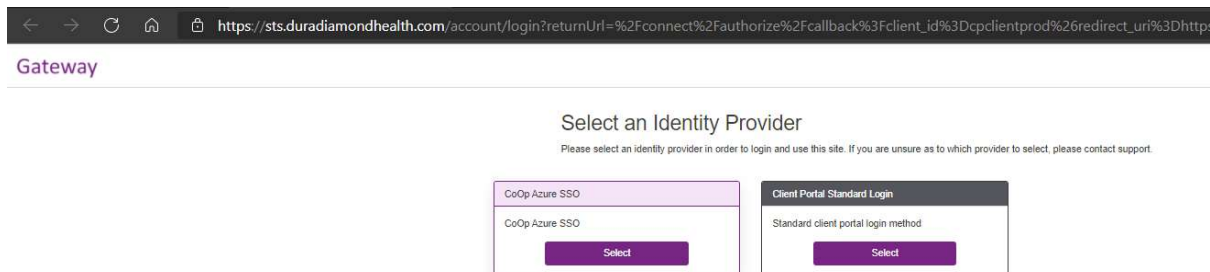
You will be able to access the portal through MyApps, the Co-op's single sign on application.

To access MyApps, copy the following link and paste into the address bar on your browser –  
<https://myapplications.microsoft.com/>

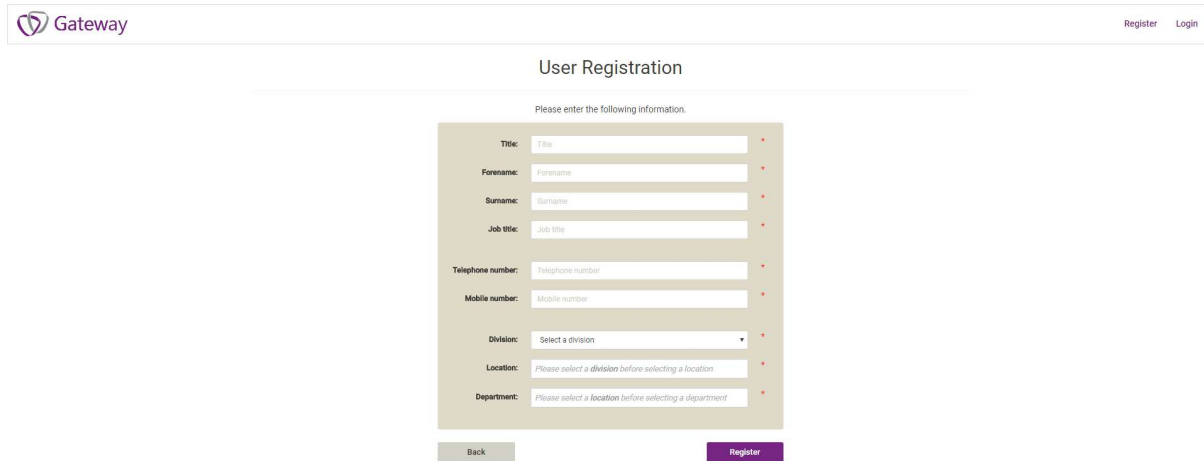
This will launch MyApps and you should be presented with the following screen:



Select the Duradiamond icon. The first time you do this you will be presented with the following screen:



Select the Co-op Single Sign On option and the following screen should be presented:

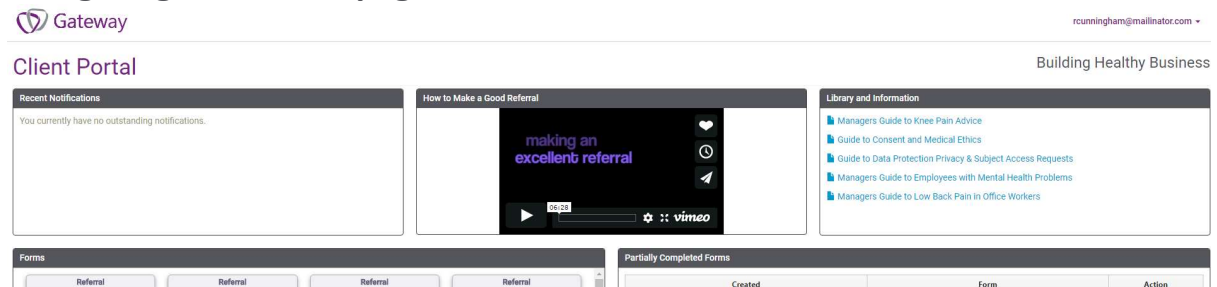


The screenshot shows the 'User Registration' page of the Gateway system. At the top, there is a 'Gateway' logo and links for 'Register' and 'Login'. The main heading is 'User Registration'. Below this, a prompt says 'Please enter the following information.' followed by a form with the following fields: Title (text), Forename (text), Surname (text), Job title (text), Telephone number (text), Mobile number (text), Division (dropdown menu), Location (text with a hint 'Please select a division before selecting a location'), and Department (text with a hint 'Please select a location before selecting a department'). At the bottom of the form are 'Back' and 'Register' buttons.

Please complete the details accurately and select register. This will then take you to the homepage of the portal.

If you do not have access to MyApps but need to access Occupational Health please email [HR\\_Wellbeing@coop.co.uk](mailto:HR_Wellbeing@coop.co.uk)

## Navigating Your Homepage



The screenshot shows the 'Client Portal' homepage. At the top, there is a 'Gateway' logo and a user profile 'rcunningham@mailinator.com'. The main heading is 'Client Portal' with a sub-heading 'Building Healthy Business'. The page is divided into several sections: 'Recent Notifications' (showing 'You currently have no outstanding notifications.'), 'How to Make a Good Referral' (featuring a video player with the title 'making an excellent referral'), 'Library and Information' (listing various guides like 'Managers Guide to Knee Pain Advice'), 'Forms' (showing a list of 'Referral' forms), and 'Partially Completed Forms' (showing a table with columns 'Created', 'Form', and 'Action').

### Recent Notifications

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

### 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 provides practical guidance on how to complete referral forms to get the best possible outcome reports.

## Library and Information

This section of the homepage contains our library of support guides. These cover a wide range of medical topics such as what Occupational Health is and what a colleague's rights are in terms of their records and consent.

## Forms

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

## 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.

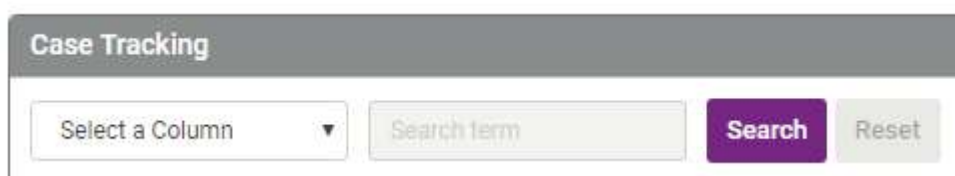
## Case Tracking

The case tracking section 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.

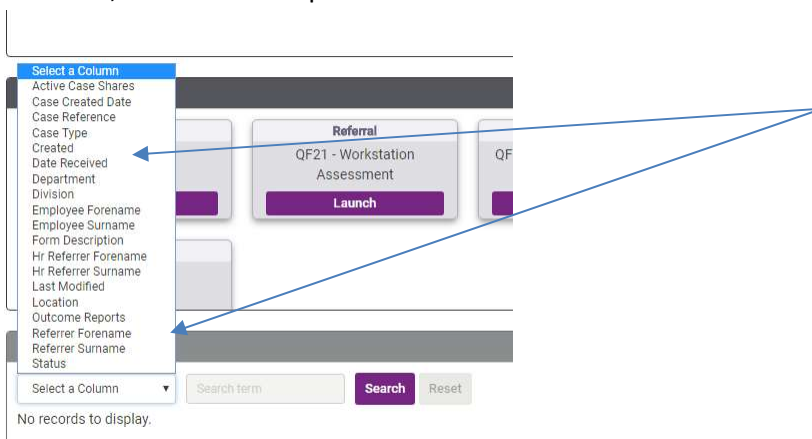
## Searching Within Case Tracking

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

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

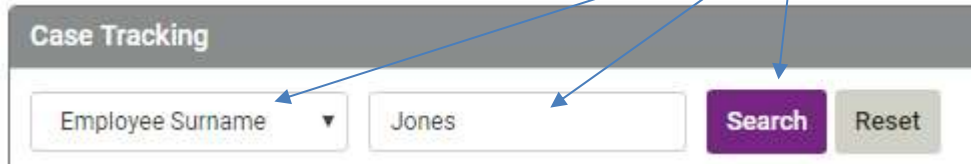


To search, click on the drop-down list and select from one of the available options.





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.

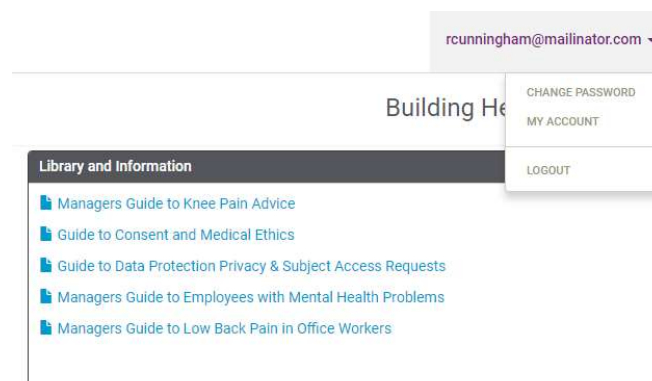
Case Tracking				
Employee Surname	Jones	Search	Reset	
Case Reference	Name	Submitted	Status	
DEMO/MR/18/7	Jones, David	02/05/2018 16:04	Triaged	

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.



## Managing Your Personal Information

Your email address and a downwards arrow will appear in the top right-hand corner of the dashboard. If you click the downwards arrow, options will appear for you to select: change password, my account and log out.

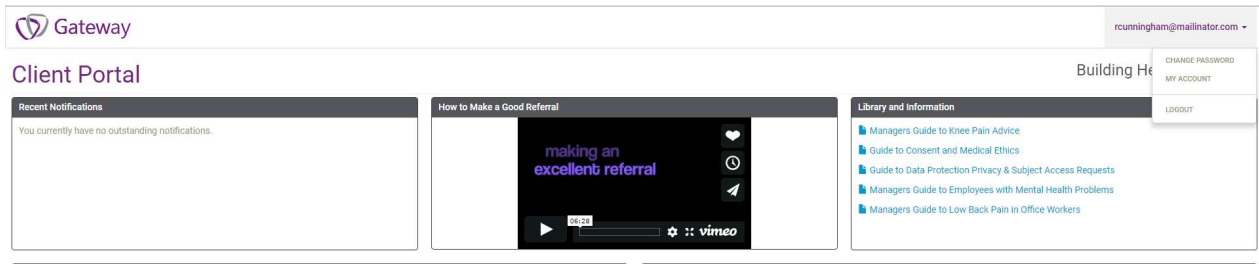


By selecting the 'My Account' button, the system will take you to a further page where you can amend your personal information entered when you initially registered.

*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.*

## 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.



## Re-referral on a closed case

When a referral has been closed, you are given the option to re-refer the case through the online portal

Case Tracking									
Select a Column	Search term	Search	Reset						Expand
Case Reference	Name	Submitted	Status	Outcome Documents	Sharing	Referrer	HR Referrer		
Not Assigned	Deeks, Natalie		Form not complete (employee)		0	Portal, Example (me)			
Exam/MR/19/3	Two, Referral	18/01/2019 09:48	Triaged		0	Portal, Example (me)			
Not Assigned	One, Candidate		Form not complete (employee)		0	Portal, Example (me)			
Exam/MR/18/2	Deeks, Natalie appointment	03/09/2018 16:54	Triaged		0	Portal, Example (me)			
Exam/PQ/18/1	Deeks, Natalie 2	03/09/2018 16:27	Closed	<a href="#">View</a>	0	Portal, Example (me)			
Exam/MR/18/1	Deeks, Natalie	03/09/2018 16:16	Closed	<a href="#">View</a>	0	Portal, Example (me)			
Not Assigned	Deeks, Natalie	24/10/2018 11:26	Rejected		0	Portal, Example (me)			

When clicking this button, a pop up will appear as below:

Re-refer case for Natalie Deeks

Are you sure you would like to re-refer this case?

This will create a new copy of the form and pre-populate it with the employee details from this case.

Before you do this, you must ensure:

- That there is not already an open referral for this employee
- That all employee details are correct and have not changed since the last referral

Cancel

Re-Refer

## The Colleague Portal

As well as line managers, Duradiamond also have a portal specifically designed for colleagues.



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 videos.

## 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 only ask questions which are relevant to an individual'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 colleague.**

## Requesting A New Questionnaire

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

Forms			
<b>Referral</b> QF30 - Pre Placement Questionnaire <b>Launch</b>	<b>Referral</b> QF21 - Workstation Assessment <b>Launch</b>	<b>Referral</b> QF23 - Ill Health Retirement Referral <b>Launch</b>	<b>Referral</b> QF20 - Management Referral <b>Launch</b>

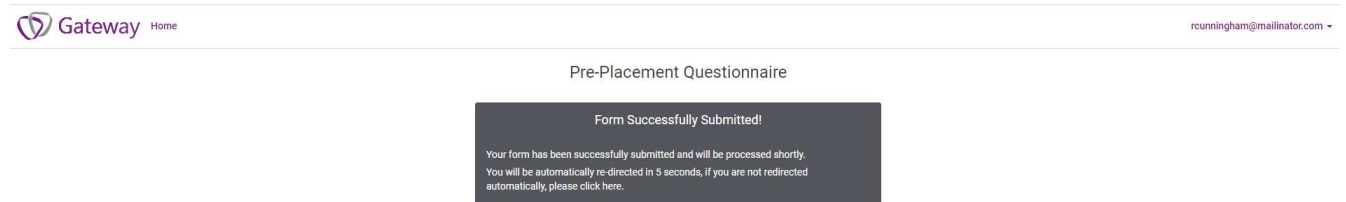
The first page explains what the form is and what it should be used for. You will then need to complete each tab in order.

The screenshot displays the 'Pre-Placement Questionnaire' form, titled 'Colleague's Details'. The form is divided into two sections: 'Personal Details' and 'Address Details'. The 'Personal Details' section includes fields for Title, Forename, Surname, Date of Birth, Job Title, Division, Location, Department, PQ/ Cost Centre Number, Hours to be worked, Full or part time (radio buttons), Home Telephone, Work Telephone, Mobile, Email Address, Address Line1, Address Line2, Address Line3, County, and Postcode. The 'Address Details' section includes fields for Street Name, Street Number, and Postcode. The form is marked with red asterisks (\*) indicating mandatory fields. A blue arrow points from a text box to the Title field, stating: 'Any field marked with a '\*' is mandatory and must be completed before you can submit the referral'. Another blue arrow points from a text box to the 'Next' button, stating: 'Use the 'next' and 'back' buttons to navigate through the pages'. A third blue arrow points from a text box to the 'Save' button, stating: 'The 'save' button allows you to save your progress so that you can continue to complete the form later.' The form is titled 'Pre-Placement Questionnaire' and 'Colleague's Details'. The page number '2 / 3' is displayed at the top right. The form is titled 'Pre-Placement Questionnaire' and 'Colleague's Details'. The page number '2 / 3' is displayed at the top right. The form is titled 'Pre-Placement Questionnaire' and 'Colleague's Details'. The page number '2 / 3' is displayed at the top right.

*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.

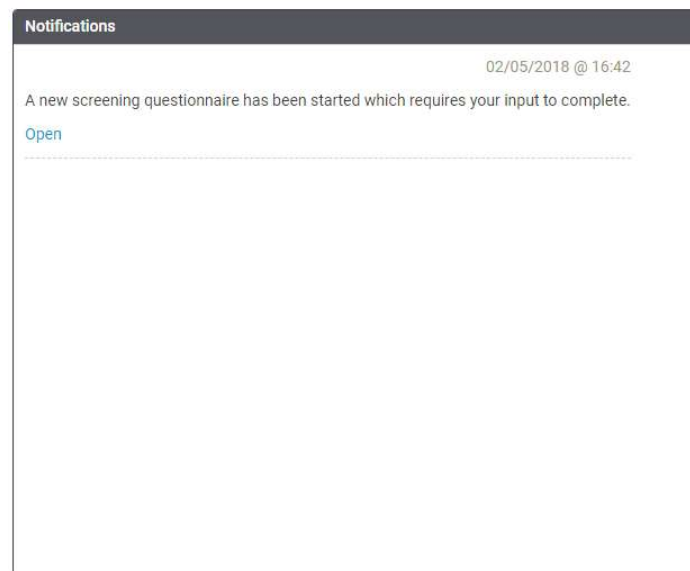
Once you've finished selecting activities, click on the 'Complete' button to send the questionnaire request to the Colleague. You will be taken to the following holding screen and then directed back to your homepage.



## Questionnaires – Colleague completion

Colleagues complete and return questionnaires through our online Colleague portal. The Colleague will be sent an email to the address you have provided asking them to register.

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 you 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.



### **Questionnaire Outcomes**

The Colleague's 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:

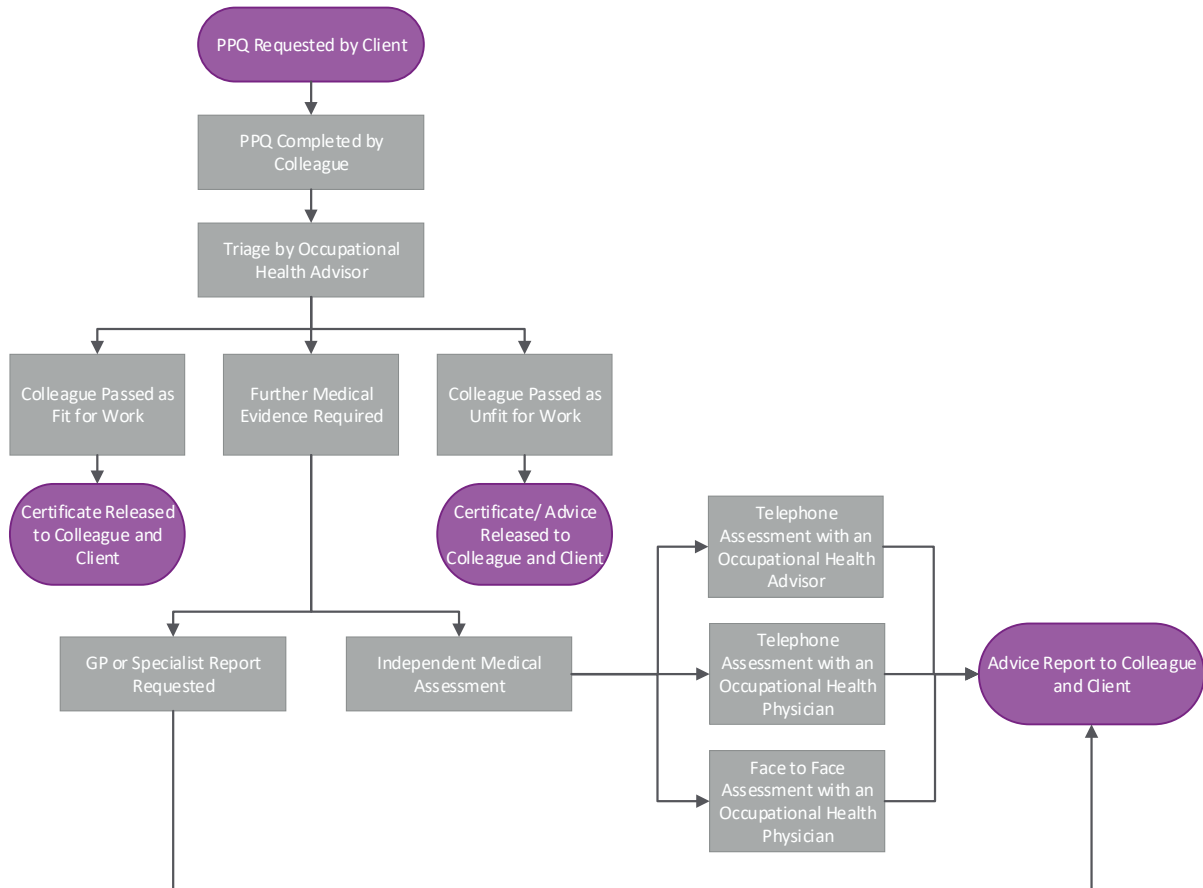
The Colleague is:

- 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.

## Standard PPQ Process Flow



## Collecting Outcome Documents

This next section provides some information on how to collect outcome documents from your portal, 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**

**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

- Log into the portal
- On your homepage, scroll to the bottom of the screen to the 'Case Tracking' section.



- Locate the 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.

## 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.

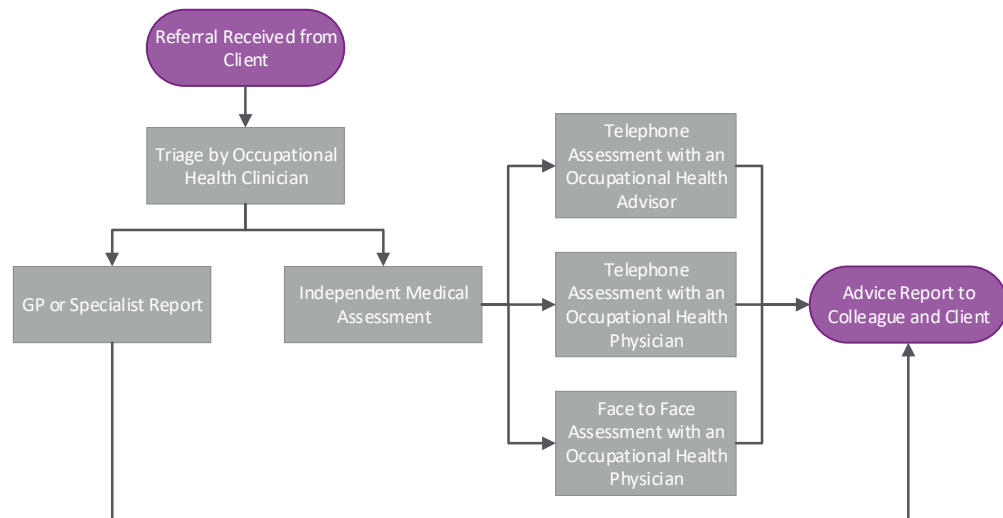
A breakdown of the referral types are as follows:

### 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.



## Work Station Assessment Referral

A Workstation Assessment Referral should be submitted in order to have a colleague's workstation assessed, by someone with specialist training, to ensure it is set up in an ergonomically optimal way. For someone with a musculoskeletal condition it is critical that their chair and desk are set up in a way which is optimal for their particular needs. We arrange for someone with specialist training to go to the individuals' place of work and assess the workstation set up. We will then provide a report following the assessment and recommend any equipment that would be beneficial for the colleague.

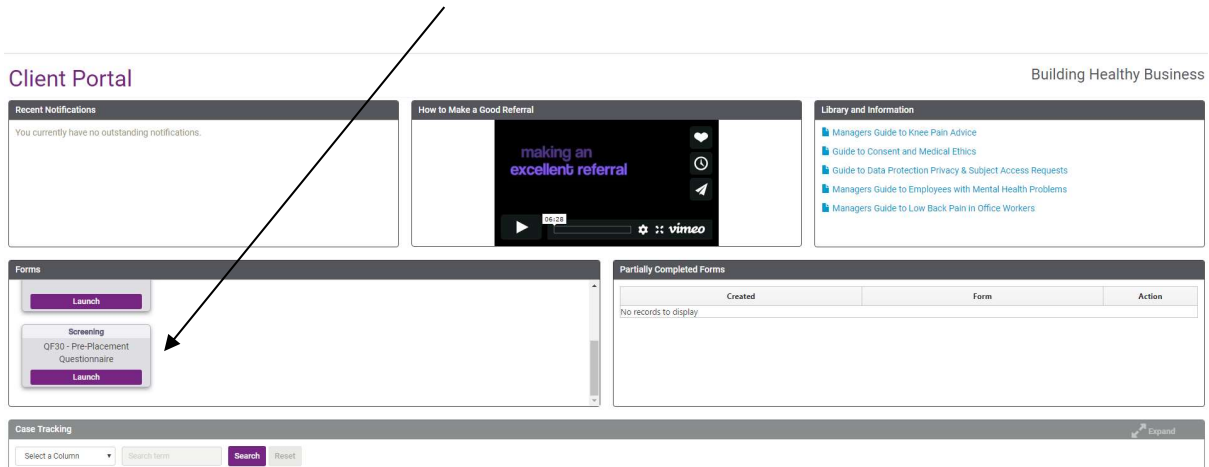
## Making A New Referral

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 colleague 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 colleague asked for any adjustments that just aren't practicable for you?

To make a new referral, select the relevant referral on the dashboard that you would like to submit.



Navigate through the screens completing the information that the system asks for including the person's job activities and information about the colleague's health and absence.

### 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

Back
Save
Next

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

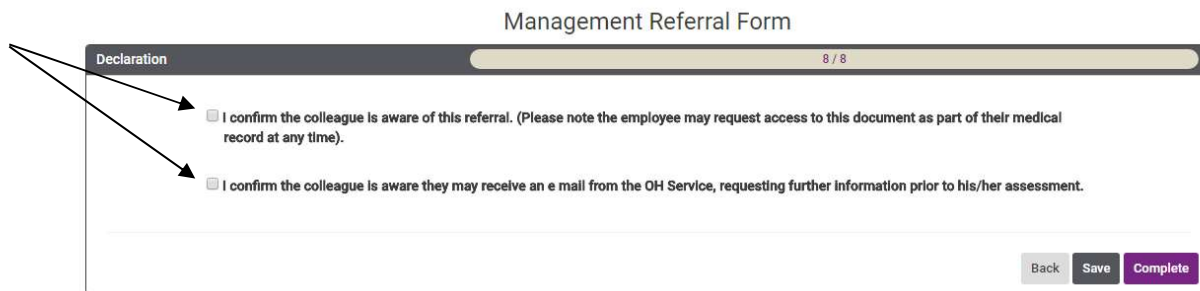
Supporting Documents
7 / 8

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

Add Files

Back
Save
Next

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.



## Tracking A Referral

In order to track the referrals that you have submitted, log in to your account and view the case tracking section.



Select the case reference number of the colleague whose case you wish to view and a drop down will appear with their information.

## 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.

## 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 Co-op should they wish to if they have been assessed by an OHP.

If a Colleague has elected to view Duradiamond's advice prior to its release to yourself, you will receive a notification email 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, this will be passed to our clinical team for review and amendment where appropriate. If this occurs, your Client Associate Team would make you aware and keep you updated.

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.

## 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. This can then be downloaded from the case tracking section.

## 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	Complete	Delete
02/05/2018 16:56	QF20 - Management Referral	Complete	Delete

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 you can delete it from the system by selecting the 'delete' button.

## 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.

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

Following an Occupational Health Referral, if our clinical team believe that your colleague 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 Co-op and not the OH Service to appropriately report any injuries, diseases or dangerous occurrences to the HSE.

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

## 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