

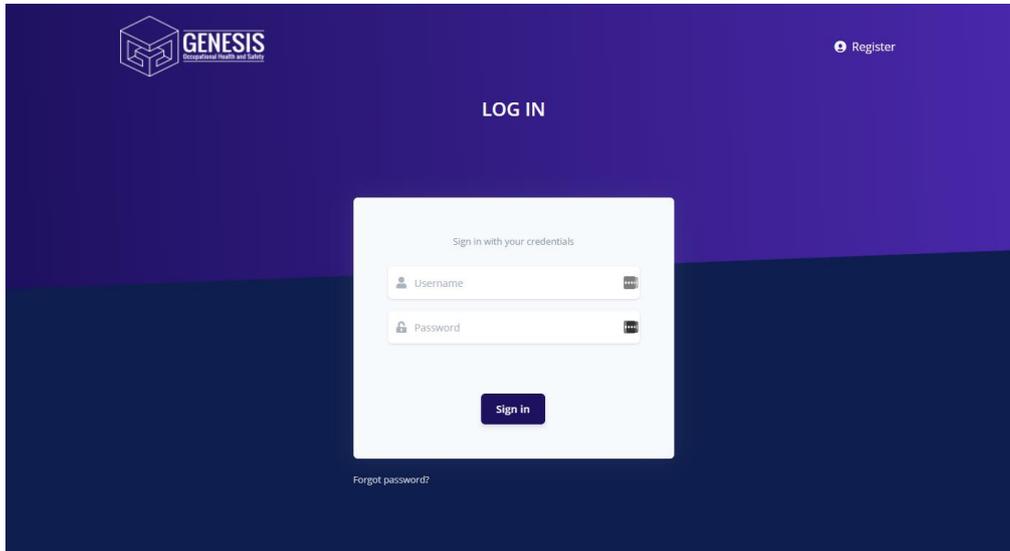


**Genesis OHS Referrals Portal User Guide V2.0  
(Manager Guide)**

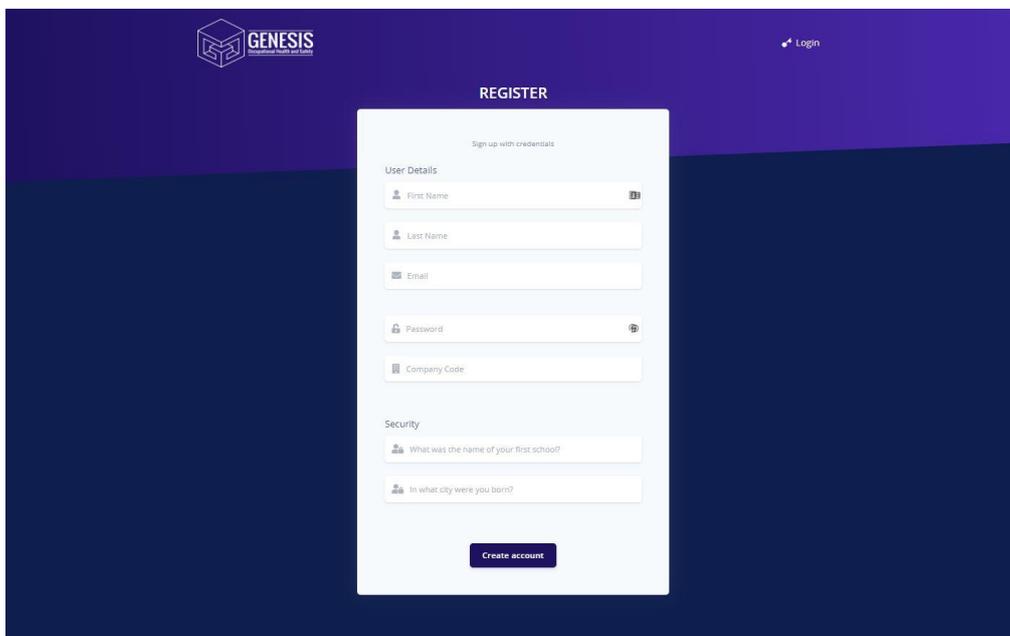
The Genesis OHS Portal has been designed to easily create Health Referrals and / or Pre-Placements.

Access to the system is provided through a simple registration process which requires a unique portal code assigned to you by Genesis OHS.

1. From your internet browser visit <https://www.genesisohsportal.co.uk>



2. Click Register
3. The Register page will now appear



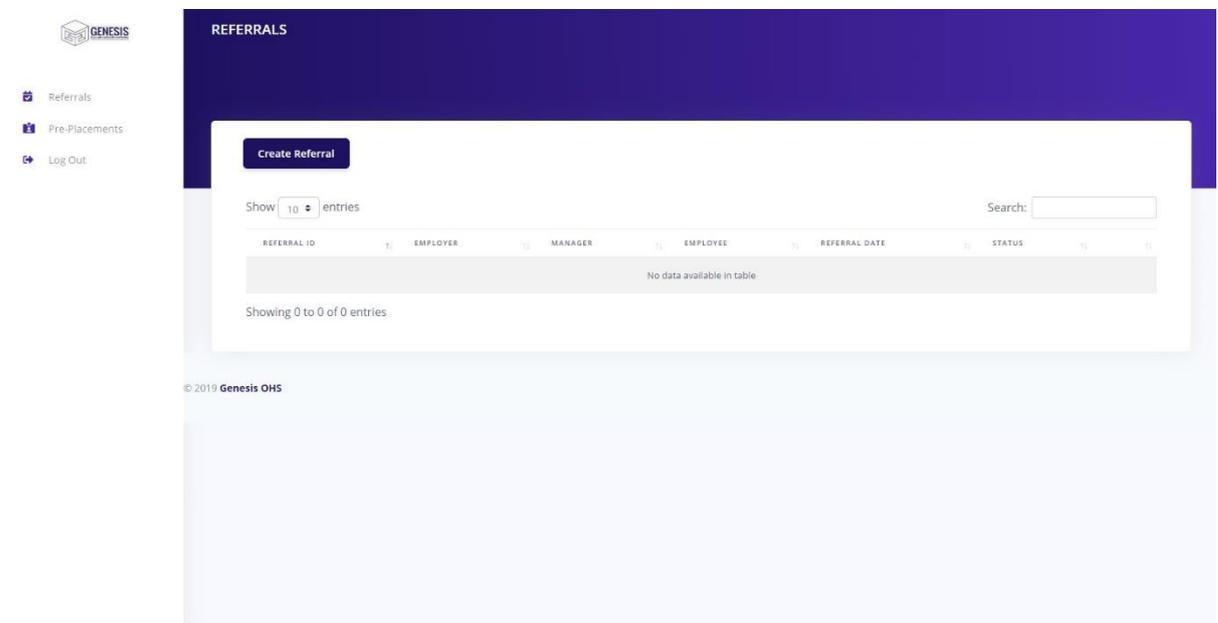
4. Enter the following mandatory information
  - a. Firstname
  - b. Lastname
  - c. Email
  - d. Password
  - e. Company Code (Provided by Genesis OHS)
  - f. 2 Security Questions

And click create account to send an activation link via email.

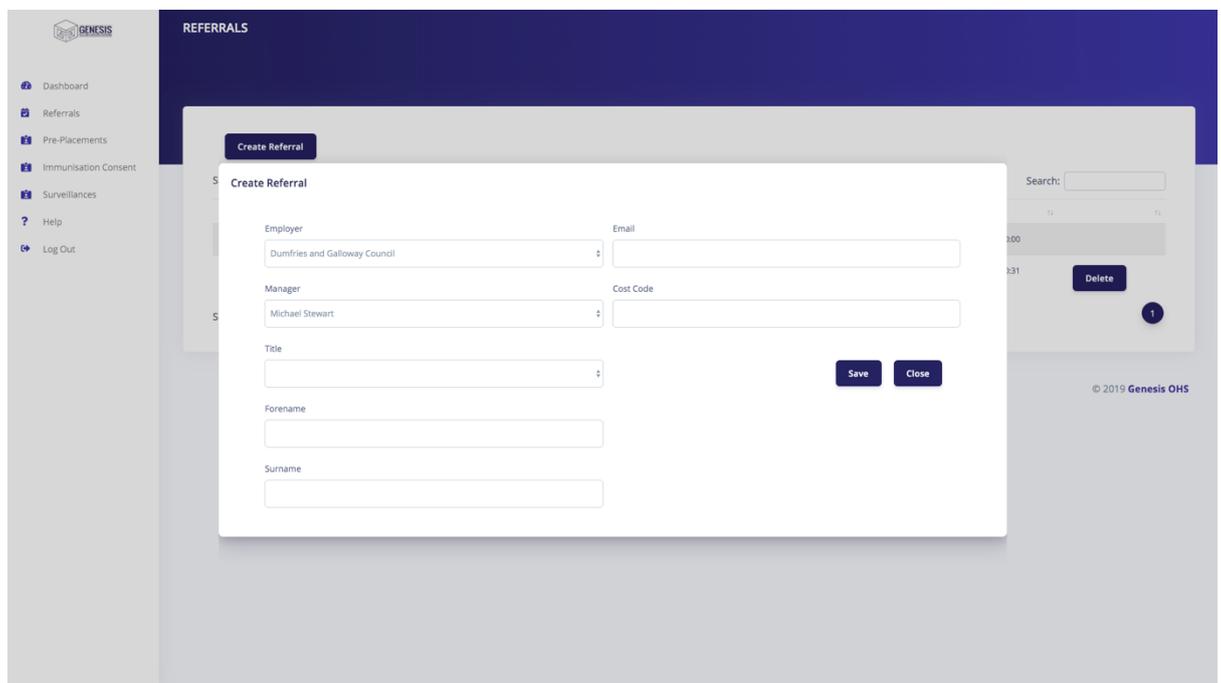
5. Once the activation email has been received (remember to check Junk), click the activation link to take you back to the Genesis OHS portal where you will now be able to login using the username and password you have just created.
6. Enter your new username and password and click 'Sign In'.
7. The main portal will now be visible. This is broken down into 2 areas: Referrals & Pre-Placement Requests.

## Referrals

1. To create a new Referral click Referrals on the left hand menu and then click the 'Create Referral' button. To view a referral, click 'view'.



2. Complete the 'Create Referral' screen by entering the following details : Employer, Manager, Title, Forename, Surname, email and Cost Code then click 'Save'.



- After clicking 'Save' you will see the following screen – this should show details of the referral you just added. Click 'View'.

The screenshot shows the 'REFERRALS' dashboard in the GENESIS system. On the left is a navigation menu with items: Dashboard, Referrals, Pre-Placements, Immunisation Consent, Surveillances, Help, and Log Out. The main content area has a 'Create Referral' button at the top left. Below it is a search bar and a 'Show 10 entries' dropdown. A table displays two referral entries:

STATUS	REFERRAL ID	EMPLOYER	MANAGER	EMPLOYEE	CREATION DATE
Appointment Made	290	Dumfries and Galloway Council	Michael Stewart	Lindsay Patterson	04/09/2019 00:00:00
Not Sent	313	Dumfries and Galloway Council	Michael Stewart	Ruth Barker	11/09/2019 13:36:49

Below the table is a 'View' button for the second entry and a 'Delete' button. The text 'Showing 1 to 2 of 2 entries' is at the bottom left of the table area. A copyright notice '© 2019 Genesis OHS' is in the bottom right corner.

- The following screen will appear. Complete ALL required fields. You cannot send unless all required fields have an entry.

The screenshot shows the 'OCCUPATIONAL HEALTH' section of the GENESIS system, specifically the 'G5-FOR-08 / Occupational Health Referral Form'. The form includes a navigation menu on the left and a main content area with the following fields:

**Employee Details**

All referrals should be discussed with the employee prior to being submitted. If requested an employee can be given a copy of referral.

CostCode: sg  More than one job

Contracted Hours (if multiple positions held please list)  Job Title (if multiple positions held please list)

Employee Number  Title

Forename(s)  Surname

Date of Birth  Gender

Telephone  Email

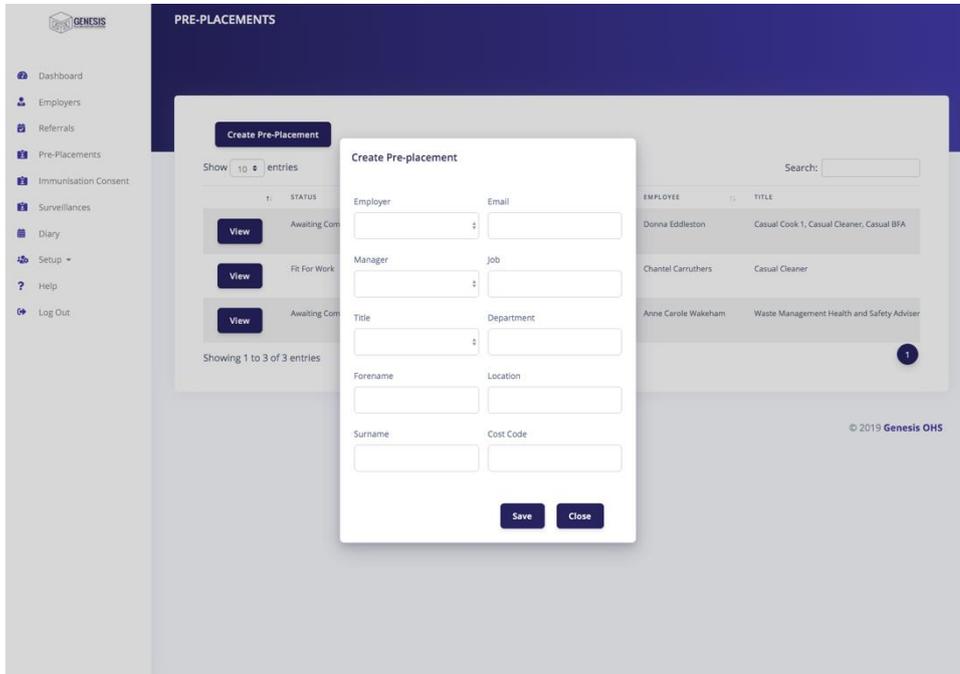
Home Address

The URL <https://www.genesisohsportal.co.uk/index> is visible at the bottom left.

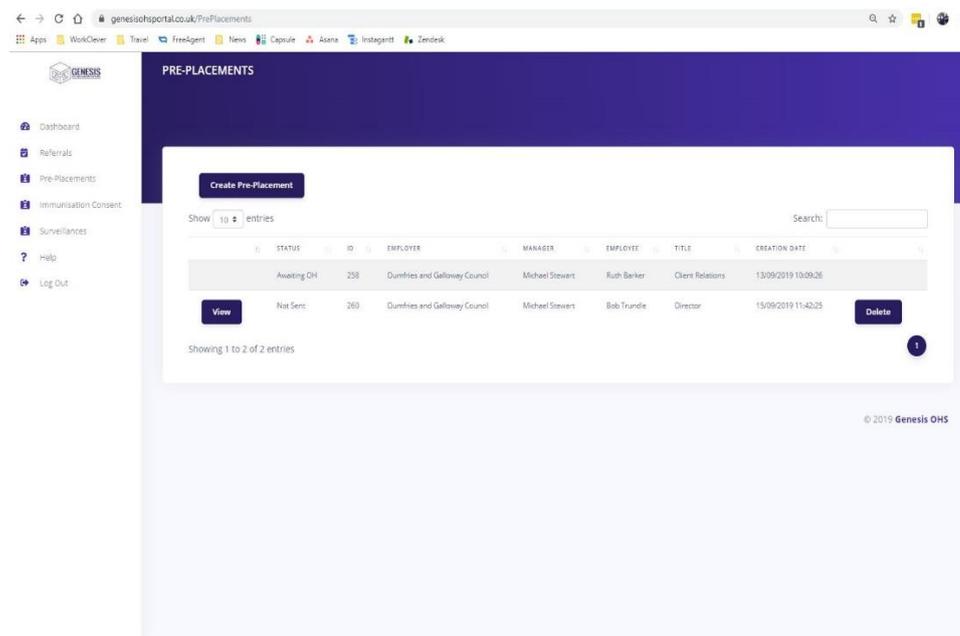
5. After completing all fields click 'send', this will send the details of the referral to Genesis OHS. If you do not want to complete the referral in one sitting, you can click 'save' and go back to it later.

## Pre-Placements

1. To create a new Pre-placement, click Pre-Placements on the left-hand menu and then click the 'Create Pre-Placement' button. A popup window will appear. Complete all fields and click Save.



2. After clicking 'Save' you will see the following screen – this should show details of the referral you just added. Click 'View' to complete.



3. The following screen will appear. Complete ALL required fields. You cannot send unless all required fields have an entry.

**PRE-PLACEMENT**

Genesis

Dashboard  
Referrals  
Pre-Placements  
Immunisation Consent  
Surveillances  
Help  
Log Out

**G5-FOR-14 / Pre-Placement Health Questionnaire**

**Candidate Details:**

Cost Code  
CO12345

Job Applied For  
Director

Department  
IT

Workplace Location  
Carlisle

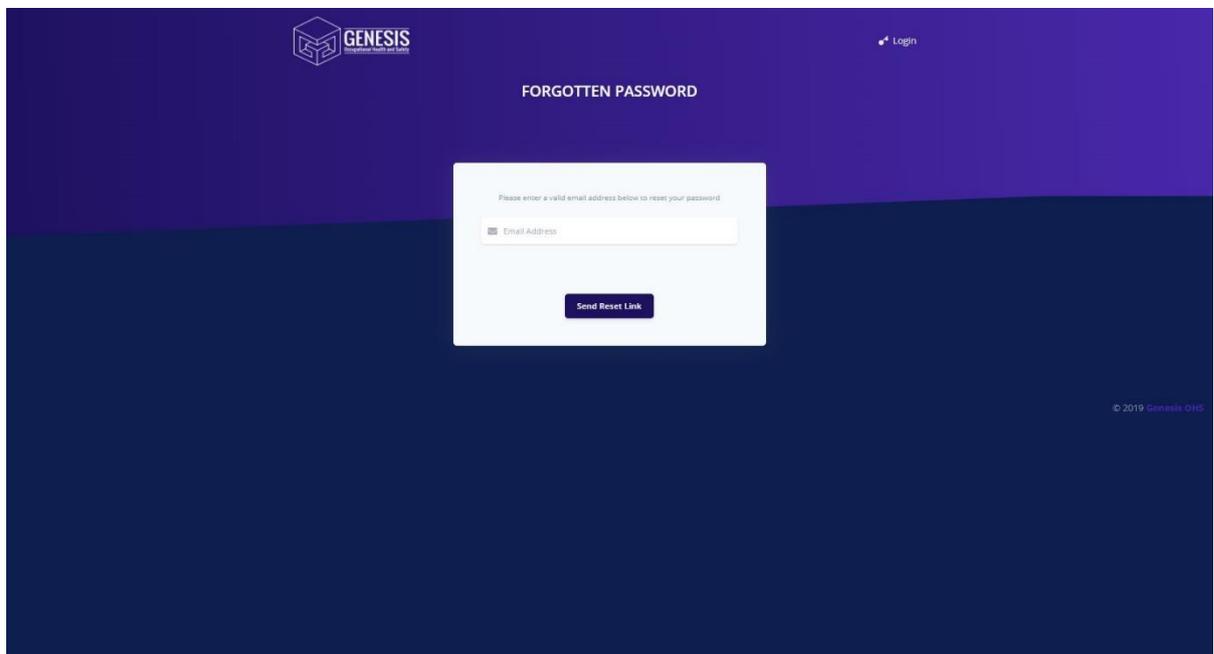
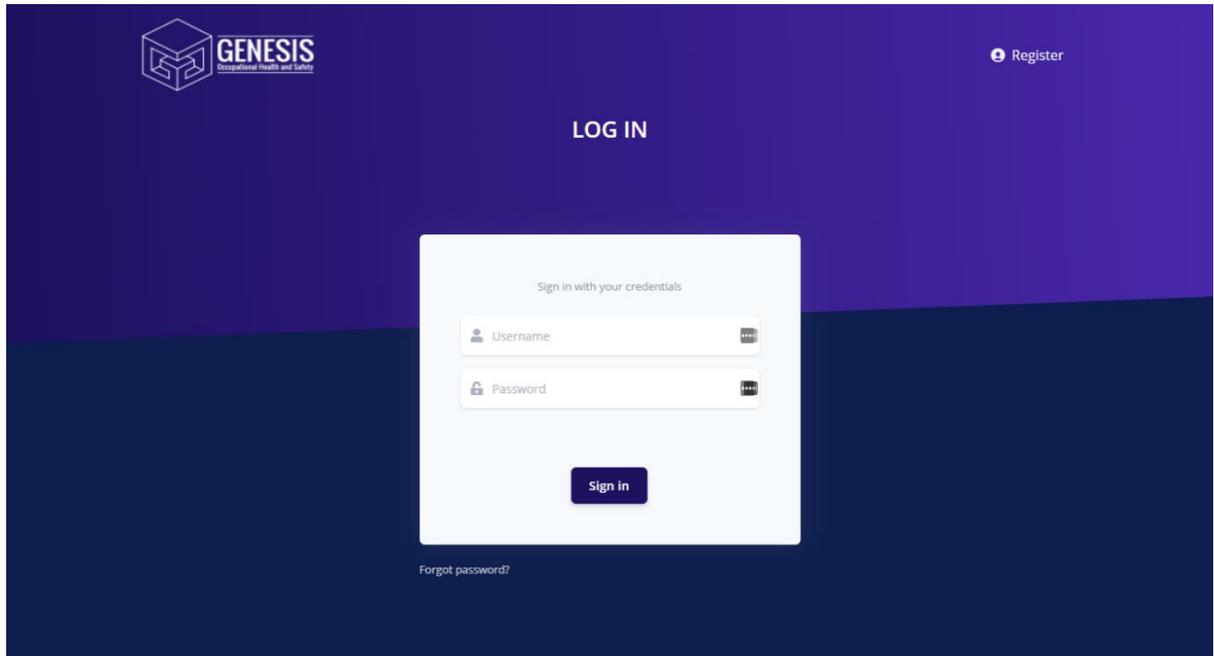
Appointing Manager  
michael@workclevertd.co.uk

**Your Details:**

4. After completing all fields click 'send', this will send the details of the Pre-Placement to the applicant and Genesis OHS. If you do not want to complete the Pre-Placement in one sitting, you can click 'save' and go back to it later.

## Passwords

1. To reset your password click the 'forgot password' link on the main login page.



A link will be sent to your email (remember to check junk). Click the link and the forgotten password screen will appear.

3. Enter the answer to the two security questions you created when first registering, following by a new password (typing the password again in the second box to confirm) and then click 'Reset Password' to store your new password.
4. Click 'Login' to use your new credentials and access Genesis OHS portal.

The screenshot shows the 'FORGOTTEN PASSWORD' interface. At the top left is the Genesis logo with the tagline 'Occupational Health and Safety'. At the top right is a 'Login' link. The main heading is 'FORGOTTEN PASSWORD'. Below this is a white box containing the instruction: 'Please enter your security details and new matching passwords to regain access to your account.' The form includes four input fields: 'What was the name of your first school?', 'In what city were you born?', 'Password', and 'Confirm Password'. Each field has a small icon on the right side. Below the fields is a dark blue button labeled 'Reset Password'. In the bottom right corner of the page, there is a copyright notice: '© 2019 Genesis OHS'.

## **Support Issues**

If you are experiencing any technical issues relating to the Genesis OHS Portal please email [support@genesisohsportal.co.uk](mailto:support@genesisohsportal.co.uk) for further assistance.