

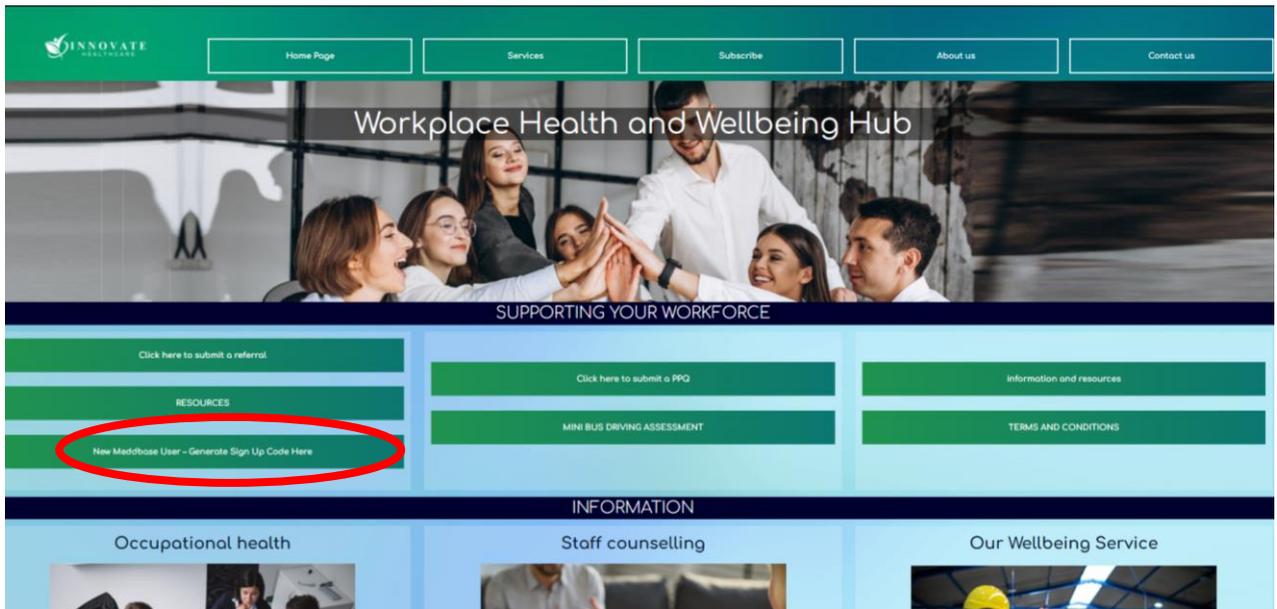
Meddbase User Guide

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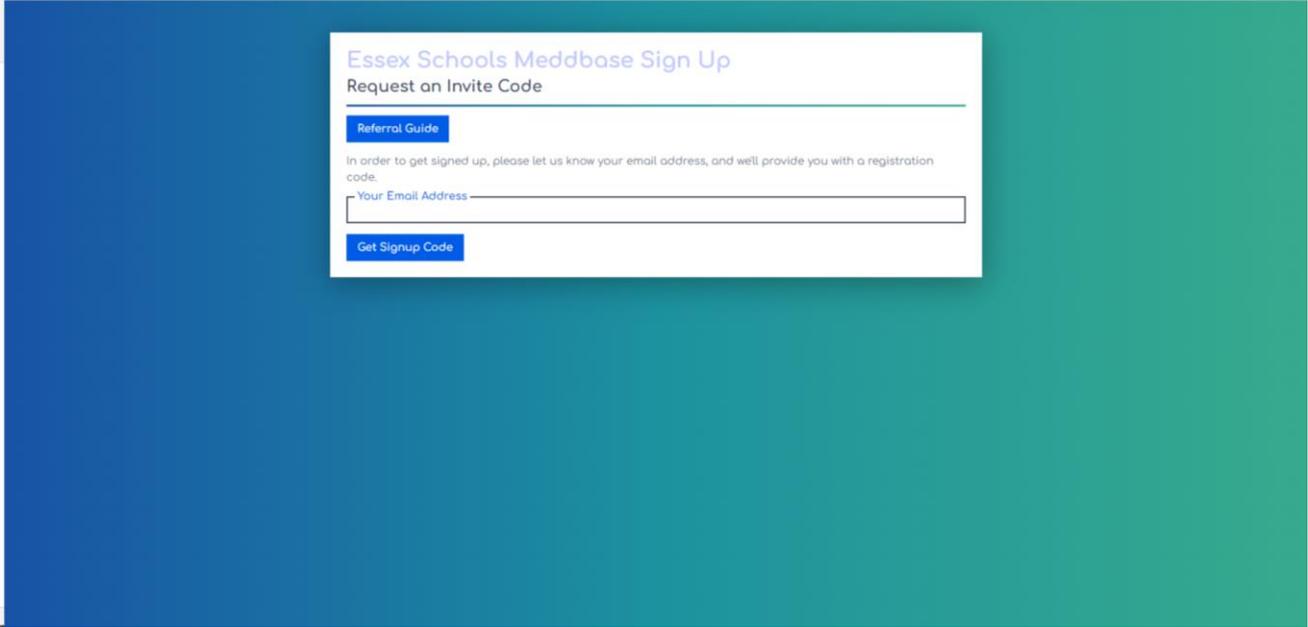
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1. How to register

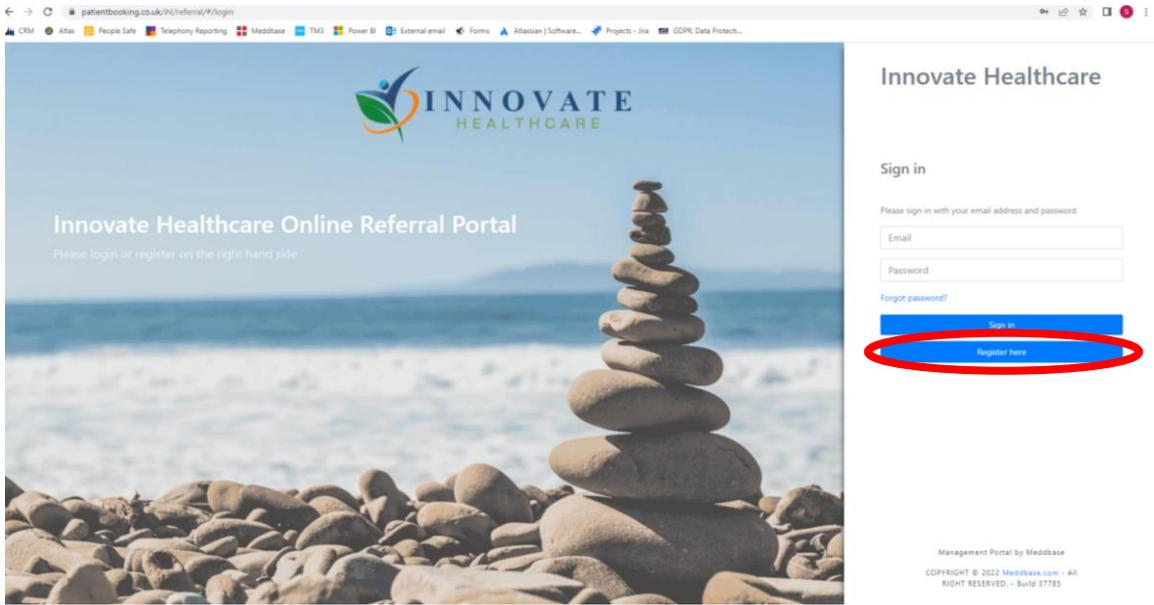
Go to the Essex Schools Hub (<https://innovatehealthcare.co.uk/essexschoolshub/>) and select New Meddbase User – Generate Sign Up Code Here



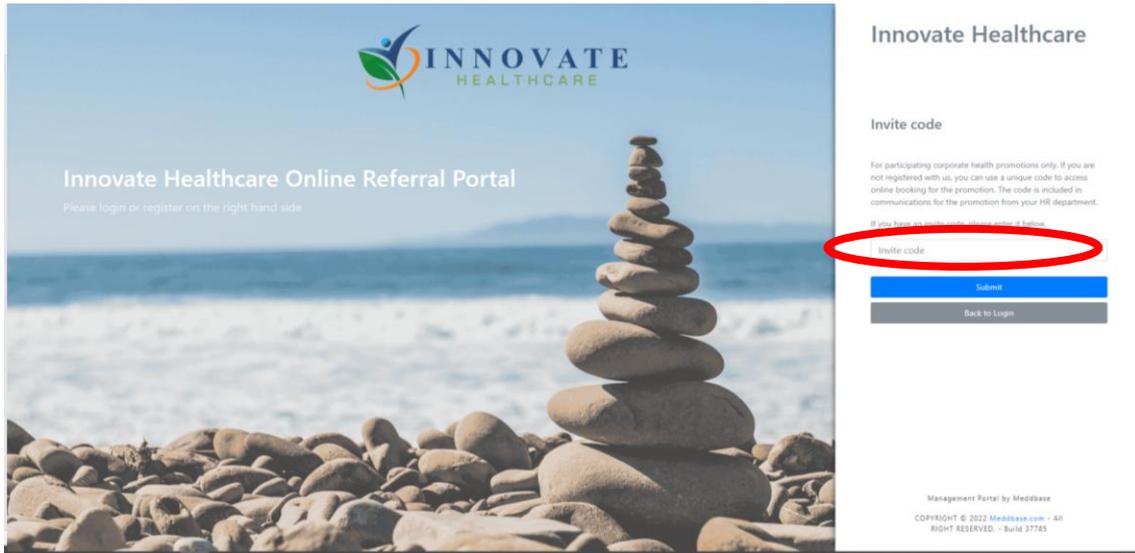
This will redirect to a page where you can enter your work email address and generate a sign up code as below:



Once you have the code, go to the Meddbase login page at:
<https://www.patientbooking.co.uk/ihl/referral/#/login>

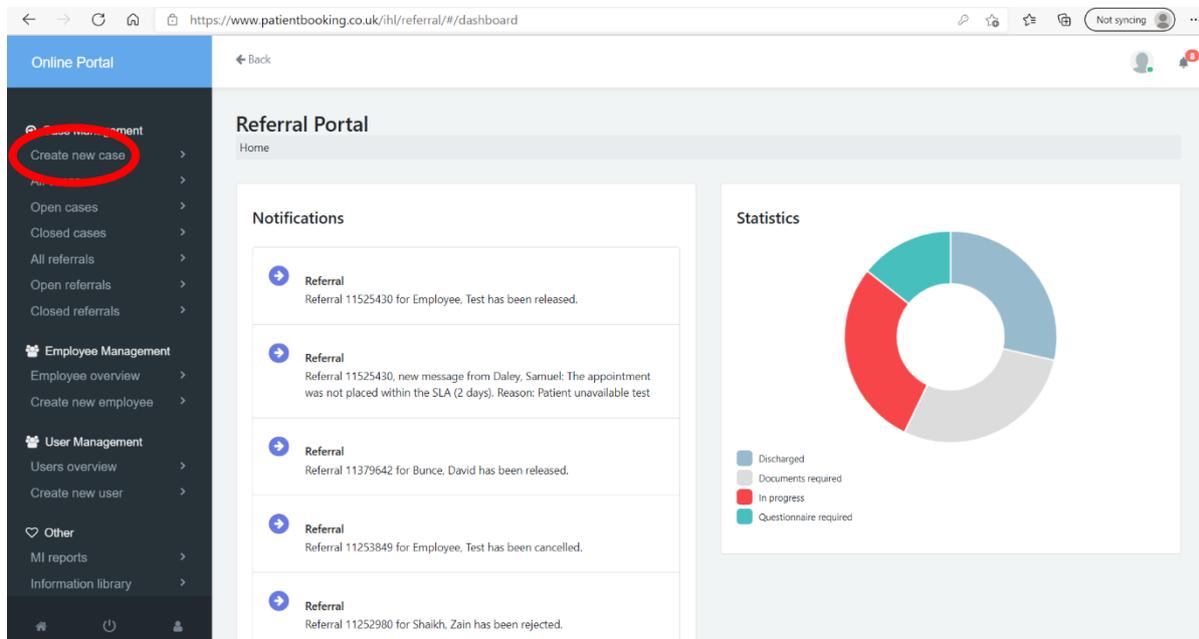


Enter the invite code on the page as follows and provide the required details for sign up:

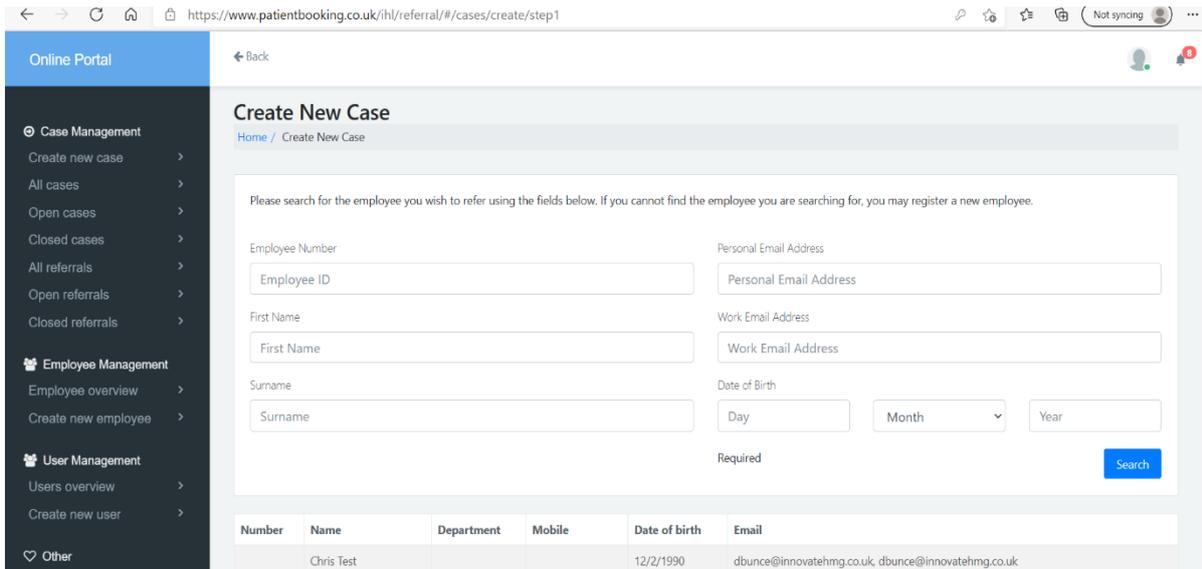


You can now login using your new login details.

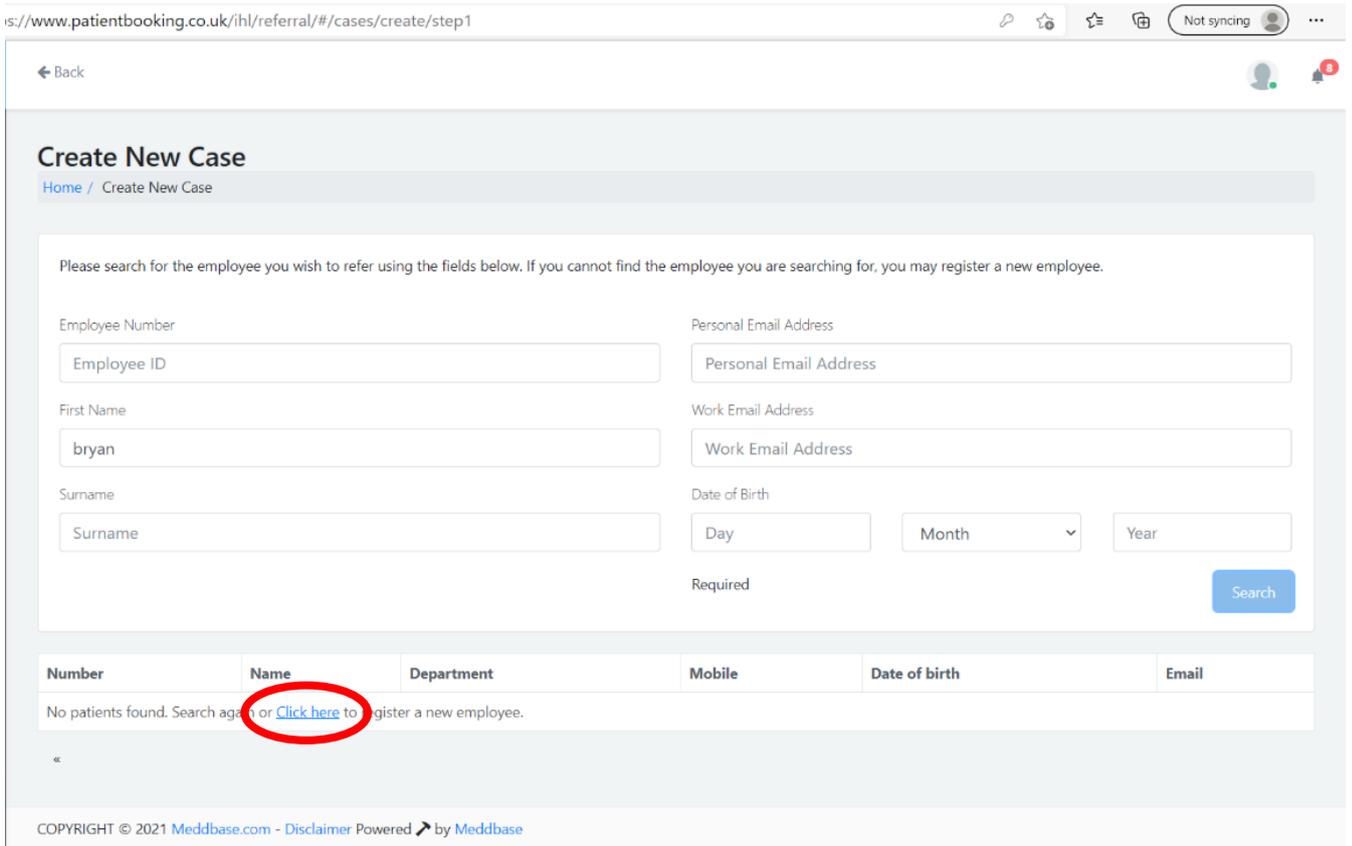
2. How to send a referral



On the left-hand tab, select 'create new case'.



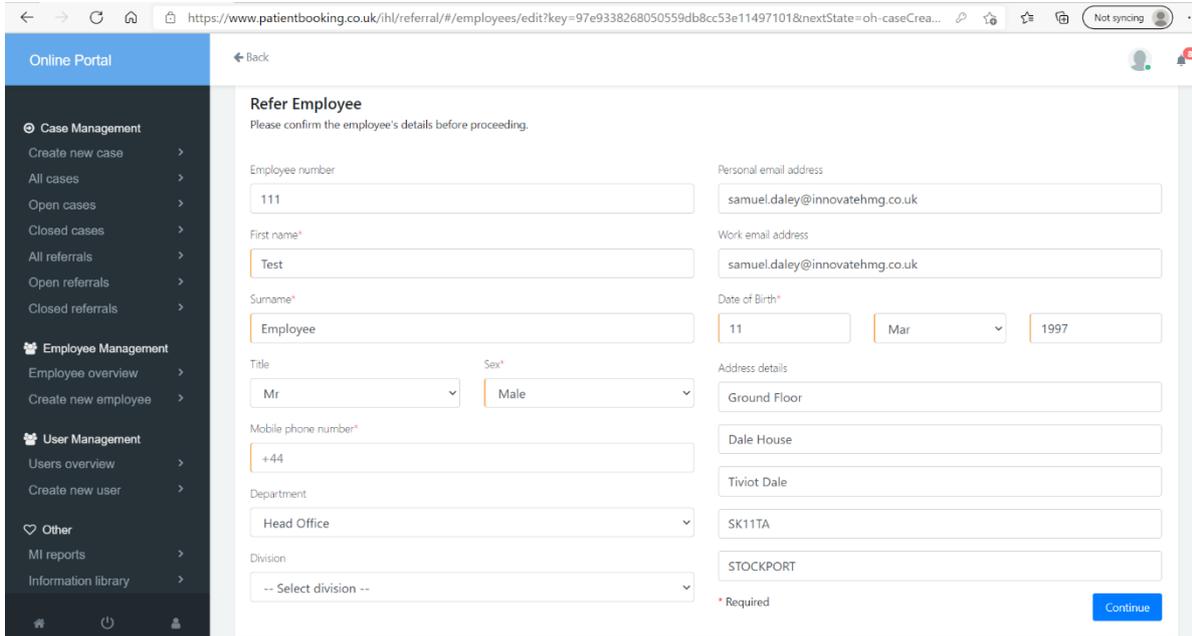
If the employee already exists on the system, use the top search fields to find them. If not, then please click the 'click here' button at the bottom of the page as illustrated in the image below.



Here, you can enter all of the employee details in the relevant fields, and click 'register new employee' to save their details.

Then go back to the list of employees and select the newly registered employee.

Then confirm the employee and click continue as shown below:



The screenshot shows the 'Refer Employee' form in a web browser. The browser address bar shows the URL: <https://www.patientbooking.co.uk/ihl/referral/#/employees/edit?key=97e9338268050559db8cc53e11497101&nextState=oh-caseCrea...>

The form is titled 'Refer Employee' and includes a 'Back' button. The left sidebar contains navigation options: Case Management, Employee Management, User Management, and Other.

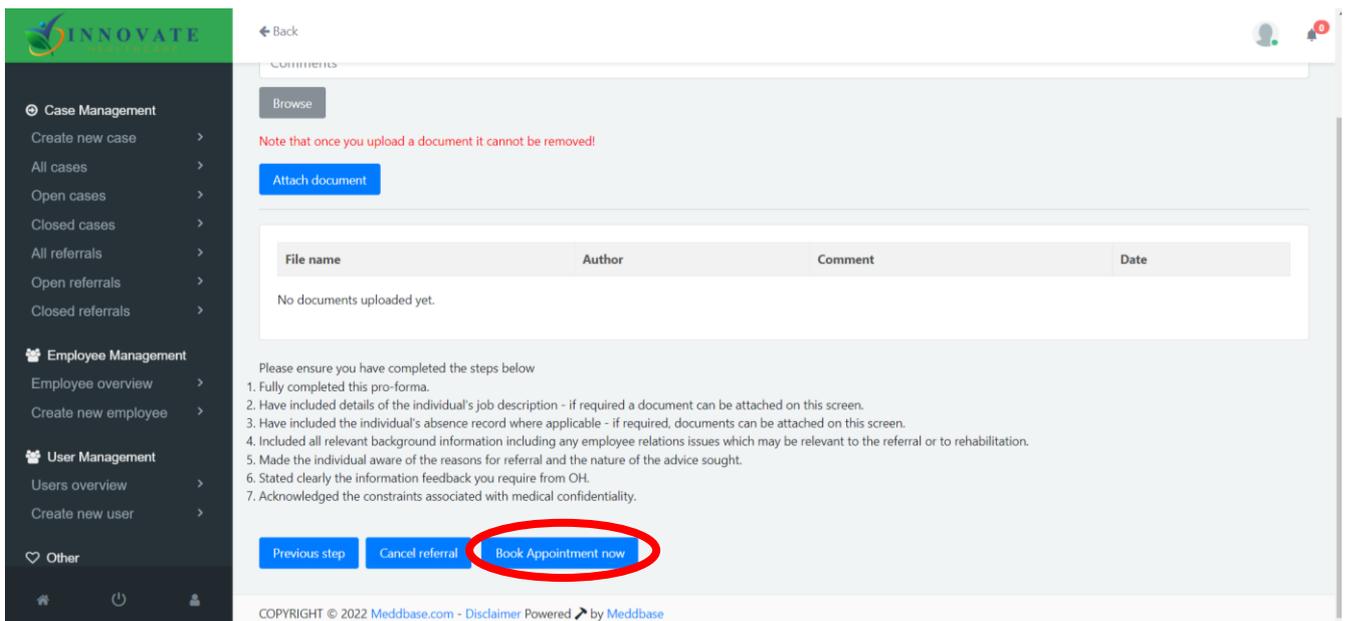
The form fields are as follows:

- Employee number: 111
- Personal email address: samuel.daley@innovatehmg.co.uk
- First name*: Test
- Work email address: samuel.daley@innovatehmg.co.uk
- Surname*: Employee
- Date of Birth*: 11 Mar 1997
- Title: Mr
- Sex*: Male
- Address details: Ground Floor
- Mobile phone number*: +44
- Dale House
- Tiviot Dale
- Department: Head Office
- SK11TA
- Division: -- Select division --
- STOCKPORT

A 'Continue' button is located at the bottom right of the form. A note indicates that fields with an asterisk are required.

On the next page, select the type of appointment that you wish to refer the employee for. This will prompt an appointment specific questionnaire, where additional required information can be entered.

Following this, a page will be presented where additional comments and supporting documents can be attached. Once you are happy with the referral, click 'Book Appointment Now' at the bottom of the page as illustrated below:



The screenshot shows the 'Comments' page in the patient booking system. The browser address bar shows the URL: <https://www.patientbooking.co.uk/ihl/referral/#/employees/edit?key=97e9338268050559db8cc53e11497101&nextState=oh-caseCrea...>

The page is titled 'Comments' and includes a 'Back' button. The left sidebar contains navigation options: Case Management, Employee Management, User Management, and Other.

The page content includes:

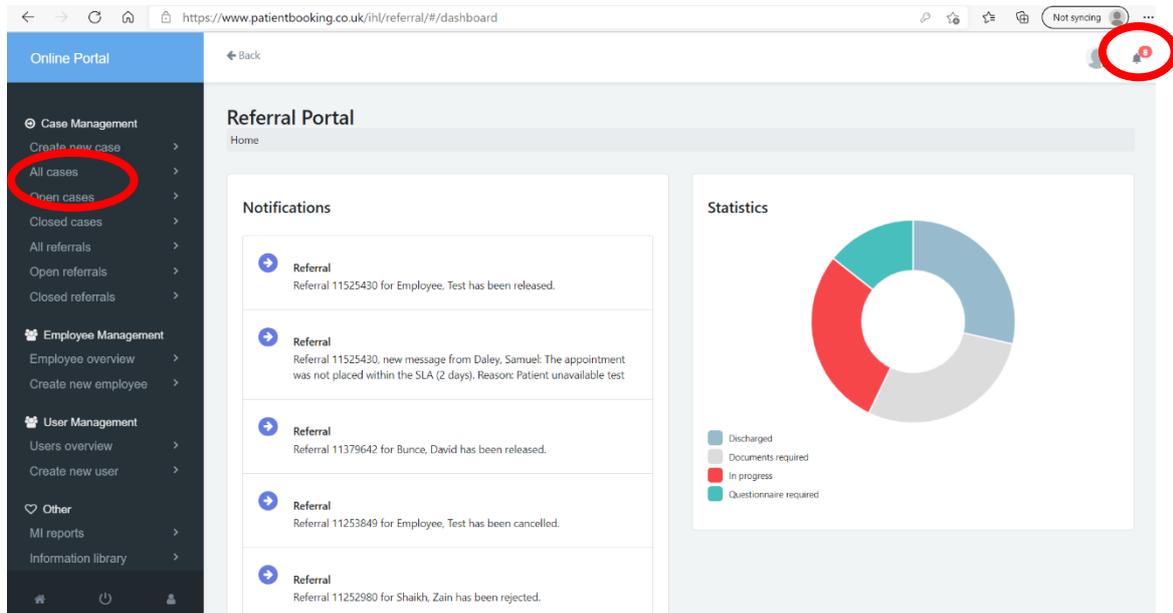
- A 'Browse' button for uploading documents.
- A note: "Note that once you upload a document it cannot be removed!"
- An 'Attach document' button.
- A table with columns: File name, Author, Comment, Date.
- A message: "No documents uploaded yet."
- A list of steps to ensure the referral is completed:
 1. Fully completed this pro-forma.
 2. Have included details of the individual's job description - if required a document can be attached on this screen.
 3. Have included the individual's absence record where applicable - if required, documents can be attached on this screen.
 4. Included all relevant background information including any employee relations issues which may be relevant to the referral or to rehabilitation.
 5. Made the individual aware of the reasons for referral and the nature of the advice sought.
 6. Stated clearly the information feedback you require from OH.
 7. Acknowledged the constraints associated with medical confidentiality.
- Buttons: 'Previous step', 'Cancel referral', and 'Book Appointment now' (highlighted with a red circle).

The footer contains the text: "COPYRIGHT © 2022 Meddbase.com - Disclaimer Powered by Meddbase".

Then click 'management referral' and then, on the next page, 'search'. Then select an appointment from the list and confirm the booking.

3. How to view a report

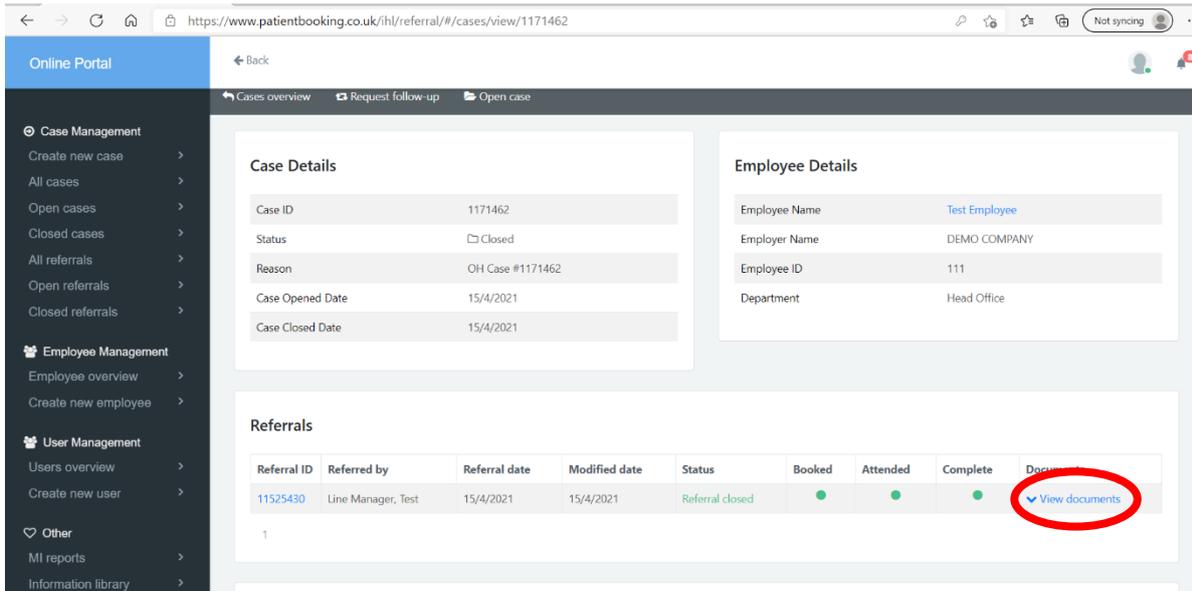
Upon completion of an assessment, the report will be sent via the portal and a notification email will be sent to advise that the report is available to view. There are two ways to navigate to the report.



The screenshot shows the Referral Portal dashboard. The left sidebar contains a navigation menu with the following items: Case Management (with sub-items: Create new case, All cases, Open cases, Closed cases, All referrals, Open referrals, Closed referrals), Employee Management (with sub-items: Employee overview, Create new employee), User Management (with sub-items: Users overview, Create new user), and Other (with sub-items: MI reports, Information library). The main content area is titled 'Referral Portal' and includes a 'Home' link. It features a 'Notifications' section with five entries, each starting with a blue plus icon and the word 'Referral'. The first notification is 'Referral 11525430 for Employee. Test has been released.' The second is 'Referral 11525430, new message from Daley, Samuel. The appointment was not placed within the SLA (2 days). Reason: Patient unavailable test'. The third is 'Referral 11379642 for Bunce, David has been released.' The fourth is 'Referral 11253849 for Employee. Test has been cancelled.' The fifth is 'Referral 11252980 for Shaikh, Zain has been rejected.' To the right of the notifications is a 'Statistics' section with a donut chart. The chart is divided into four segments: Discharged (blue), Documents required (grey), In progress (red), and Questionnaire required (teal). A legend below the chart identifies these segments. In the top right corner of the browser window, a notification bell icon with a red badge is circled in red.

The report being available to view will notify in the top right under the notifications bell icon as shown above. You can also search for the case under the all cases tab.

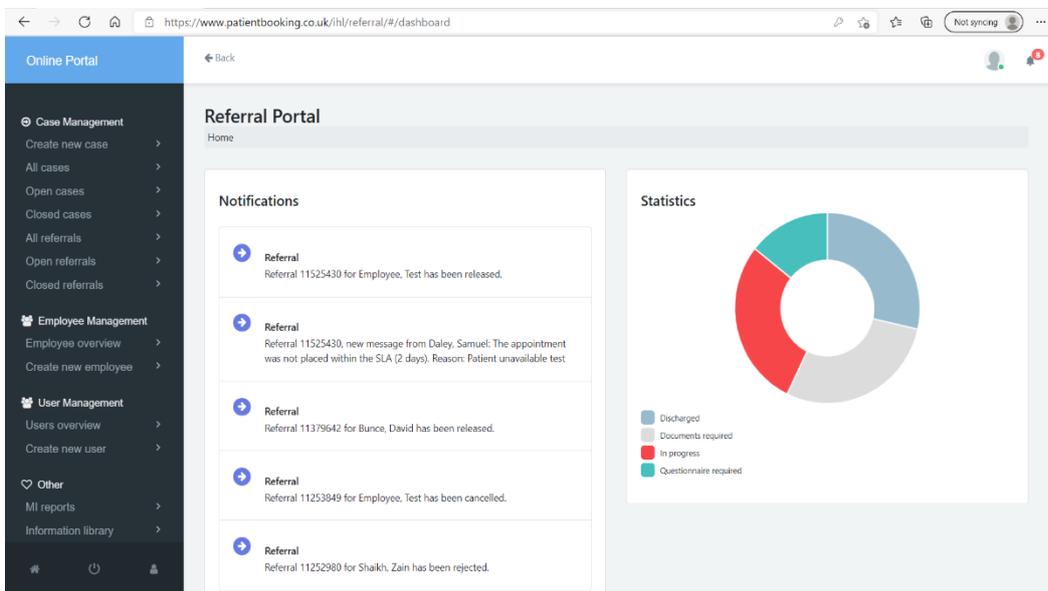
Once you have located the correct file, click on that file to be taken to the following page:



Then simply click view documents and select the report from the drop down.

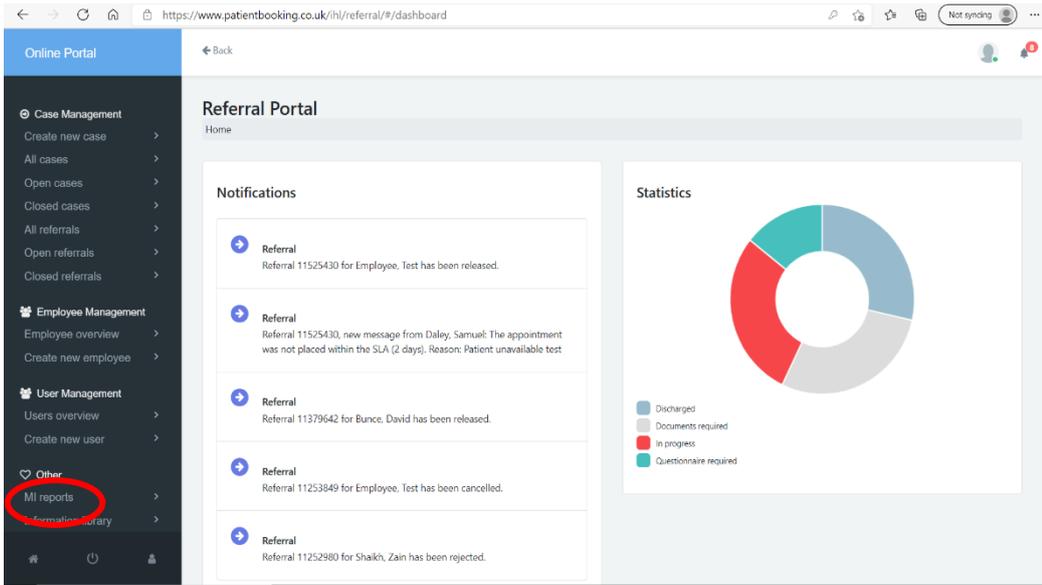
4. How to access and interpret management information (MI) in Meddbase

Case Overview



On the home screen, a pie chart will display on the right that highlights the current status of all of your referred cases. It will highlight how many have been discharged, how many require further documents or questionnaires, as well as how many cases are in progress currently.

Viewing detailed management reports



To navigate to the detailed management information reports, use the tab on the left of the page and select the 'MI Reports' tab as shown above.

← Back



Management Information

Management Information

Title	Description	Chart Type
Absence Data (by patient)	An overview of absence data, with a focus on employee demographics within a chosen date range	table
Absence Data (by reason for absence)	An overview of absence data, with a focus on absence reasons within a chosen date range	table
Absence Data (Extended)	An overview of absence data, with a focus on employee demographics within a chosen date range	table
Absence Overview	An overview of absence details within a chosen date range	table
Assessment Outcomes	An overview of outcomes from all assessment types	stacked-bar
Bradford Score	A view of the impact of employees' absences on our customer's organisation	table
Case Management - New Referrals	An overview of case management details within a chosen date range	table
Case Outcomes	An overview of outcomes from case management	pie
Closed Referrals	An overview of closed referrals within a chosen date range	table
Compliance	An overview of compliance for all assessment types	pie
DNA'd, Cancelled and Rejected Referrals	An overview of all DNA'd, cancelled and rejected referrals within a chosen date range	table
Long Term Absences	An overview of absence data that exceed 20 days within a chosen date range	table
Open Referrals	An overview of open referrals within a chosen date range	table
Recalls	A list of employee recalls	table
Referral Reasons	An overview of reasons why employees have been referred	bar

On the management information page, a number of different reports will appear with a brief description of what each report shows. For most reports, you will be asked to select the relevant date range for which you want the data to display for. On the page above, the right-hand column will advise what type of chart the report is.

