

Generate and Issue a Certificate or Case Report

kinseed

Learn how to Generate and Issue a certificate (Pre-Placement, Health Surveillance, Immunisations), or a Report (Case Referral)

1

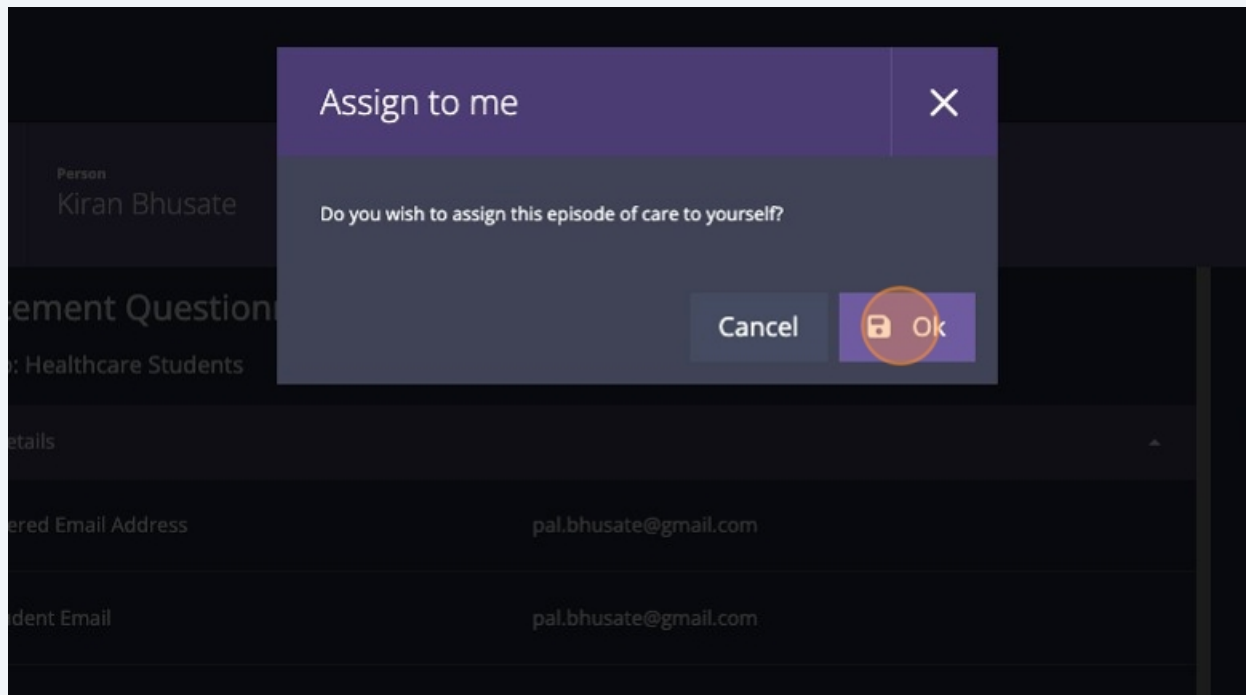
Open an Episode for a person where you're ready to issue a certificate (Pre-Placement, Health Surveillance, Immunisations) or a Report (Case Referral)

2

If the episode is not currently assigned to you, click **Assign to me** to assign it to yourself

The screenshot displays a software interface with a dark theme. On the left, there is a list of episodes, each represented by a row with a purple header and a dark body. The first row has a purple header with a small upward arrow. The subsequent rows have dark headers and bodies, with the first three rows showing email addresses ending in '@gmail.com' and the last row showing the number '316231'. On the right, there is a detailed status view for a selected episode. It features a purple header with the text 'Status'. Below this, there is a purple box with the text 'P4b' and a dark box with the text 'Preplacement Assessment Completed'. Below this, there is a dark box with the text 'Final certificate generated 12/01/2024 at 9:35AM'. At the bottom, there is a dark box with the text 'Assigned to: Mathew Hiley (OH)' and a brown circular button with the text 'assign to me'.

3 Click "Ok"



Assigning an episode to yourself marks you as the last person to take action on the episode, and allows you to make changes / progress the episode with the Next Steps button

Generating the Certificate

4 Click "Generate Certificate"

@gmail.com

@gmail.com

@gmail.com

816231

Kiran Bhusate

P4b **Preplacement Assessment Completed**
Final certificate generated 12/01/2024 at 9:35AM

Assigned to: Joshua Knight (OH)

Next Steps

Generate Certificate

Manage bookings

Cancel Preplacement

5 Choose the type of certificate or report to issue, and fill in the details as required

Generate Certificate

A fitness certificate will be generated for **Kiran Bhusate** (role group: Healthcare Students). The contents of the certificate will be generated based on the following options:

Certificate Type: Final

Assessment Decision: Please select one

Summary of Medical Situation: Enter a summary of the medical situation

6

When you've finished adding the required details for the certificate or report, click the **Preview** button

The screenshot shows a dark-themed form with several dropdown menus and a text input field. The dropdown menus are labeled: 'Select the applicable Equality Act statement' (value: Not Applicable), 'Select the applicable wider provisions Equality Act statement' (value: Pregnancy: NAME is currently pregnant, which is a protected), 'Exposure prone assessment' (value: Not Applicable), and 'Tuberculosis assessment' (value: Not Applicable). There is a checkbox labeled 'Include confirmation of bloods/vaccines completed?'. Below these is a text input field labeled 'Additional note for'. At the bottom right, there is a purple button with an eye icon and the text 'Preview Certificate', which is circled in orange.

7

Check the contents of the certificate, and when ready, click **Generate**

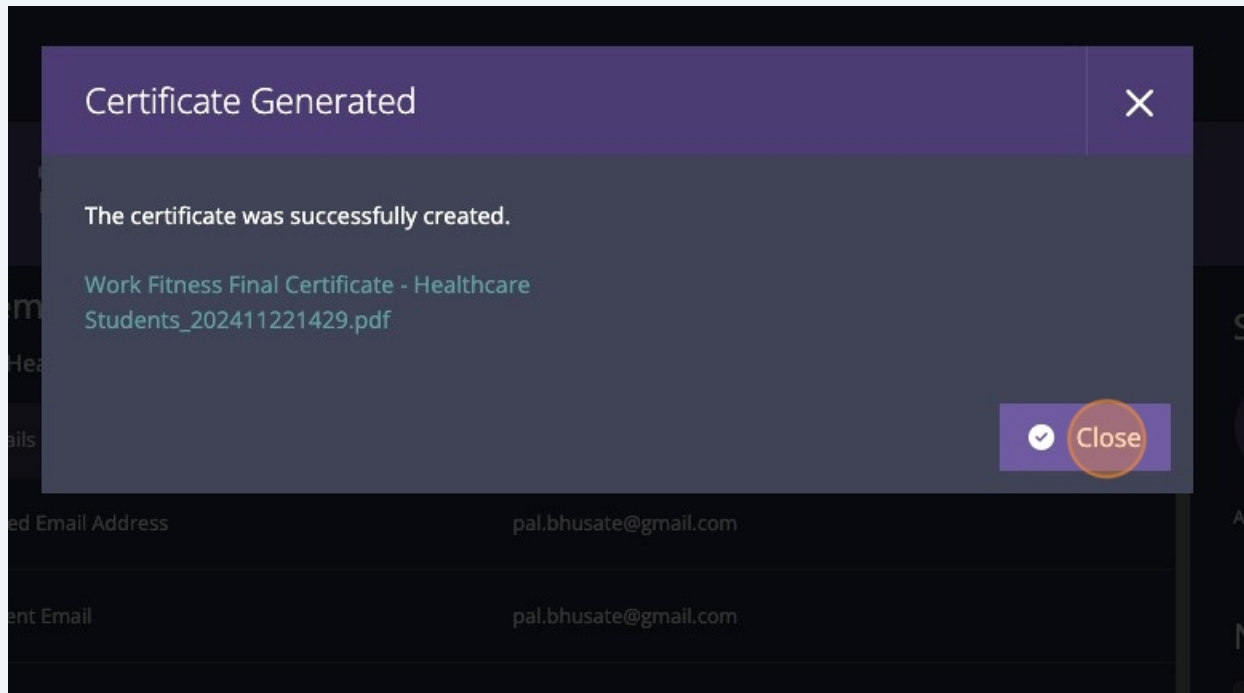
The screenshot shows a light-themed certificate preview. It contains the following text: 'Details of accommodations and adjustments here', 'Summary of Medical Situation:', 'Enter the summary of the medical situation here', 'Pregnancy: Kiran Bhusate is currently pregnant, which is a protected characteristic of the Equality Act. The wider provisions of the Act are therefore likely to apply.', 'We would recommend that an appropriate risk assessment is in place for the placement/course of study in line with your usual health and safety procedures and policies.', 'If you have any questions, please do not hesitate to contact us on [redacted] or e-mail the post-offer screening team on [redacted]'. Below this is a signature box with the text: 'Signed by: Mr Joshua Knight (OH)', 'On behalf of: King's Steed Occupational Health', 'Digitally signed on 22/11/2024 at 14:28 (GMT)', and 'Signature'. Below the signature box is the 'Date of issue: 22/11/2024'. At the bottom, there are four logos: 'Social Enterprise UK Certified Member', 'SEQOHS', 'CIVIS', and 'CYBER ESSENTIALS PLUS'. At the bottom right, there are two buttons: 'Back to edit' and 'Generate', which is circled in orange.



Note Certificates do not require physical signatures - they are digitally signed by whoever clicks "Generate" for the certificate.

8

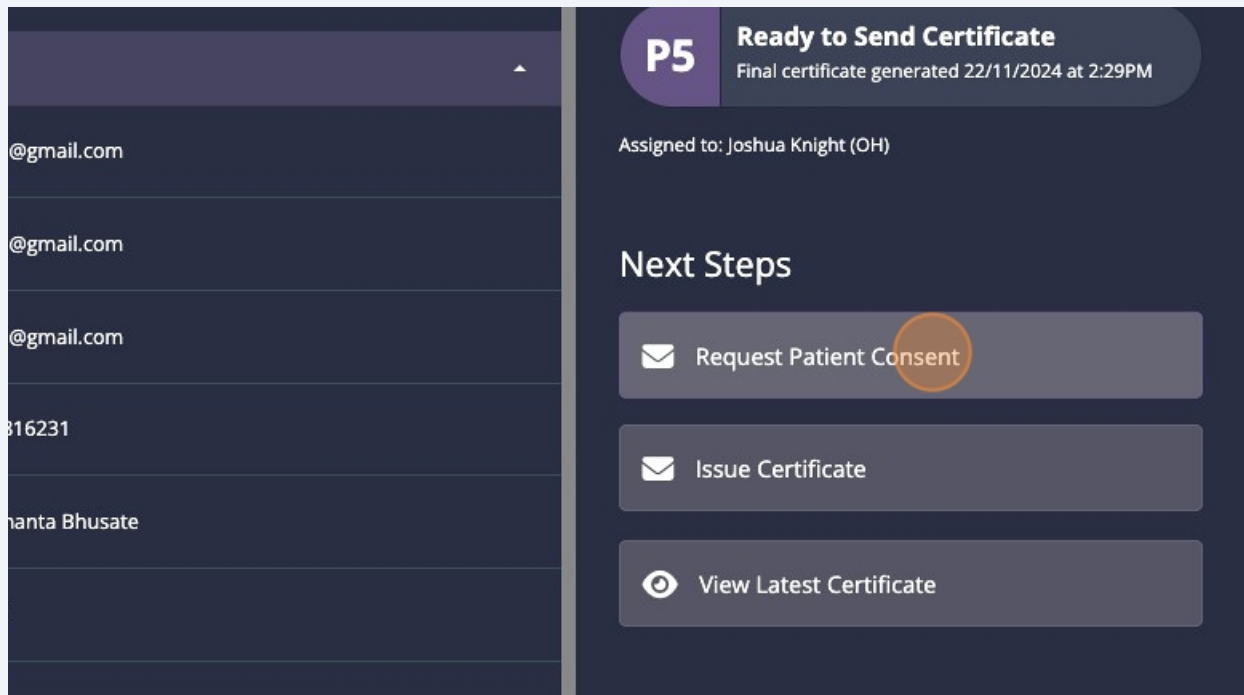
Click "Close"



Issuing the Certificate

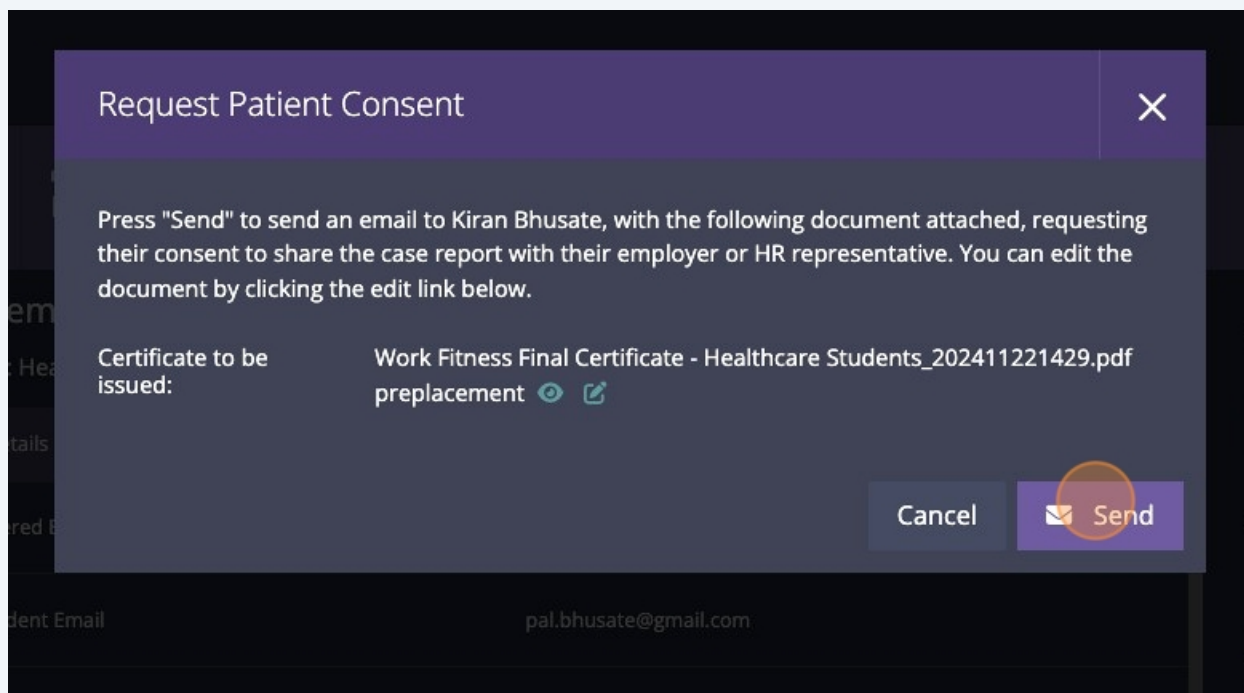
9

If you need to check for consent with the person before sending the certificate or report, click the **Request Consent** button



10

Click **Send** to request consent from the person.

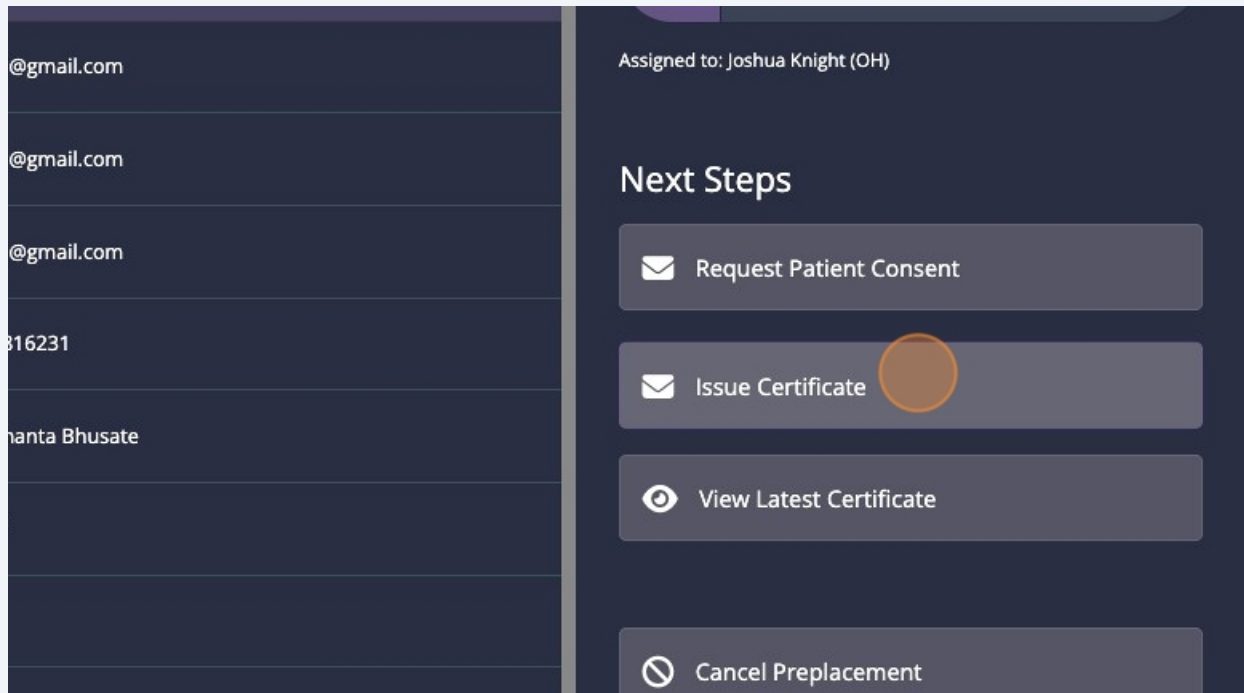


11

If you have requested consent, the episode will update status to tell you when the person has provided consent (or denied consent)

12

To issue the certificate, click **Issue Certificate**



13

Choose who you would like to send the certificate to from the options on the dialog box

Issue Certificate

Click the Send button below to formally issue the latest fitness-for-work certificate to the person's employer or HR representative.

Certificate to be issued: Work Fitness Final Certificate - Healthcare Students_202411221429.pdf

Select recipients:

To:	Cc:
<input checked="" type="checkbox"/>	<input type="checkbox"/> Human Resources hr@testorg.com
<input type="checkbox"/>	<input type="checkbox"/> Recruitment recruitment@testorg.com
<input type="checkbox"/>	<input checked="" type="checkbox"/> Health and Safety healthandsafety@testorg.com
<input checked="" type="checkbox"/>	<input type="checkbox"/> Person's line manager pal.bhusate@kinseed.com
<input type="checkbox"/>	<input type="checkbox"/> Preplacement Initiator MEDIWORK_SYSTEM_ACCOUNT



Make sure the correct people are selected. If you do not want the document to be sent to the individual in question, make sure the **Send Copy to Person?** tickbox is not checked.

If an address is wrong, close this dialog box and correct the address in the person's record first.

14 Click "Issue Certificate"

Replacement Initiator: MEDWORK_SYSTEM_ACCOUNT

Distribution:

To:

hr@testorg.com,pal.bhusate@kinseed.com,

CC:

healthandsafety@testorg.com,

☐ Additional Cc recipients? (comma-separated)

☒ Send copy to person?

Close Issue Certificate

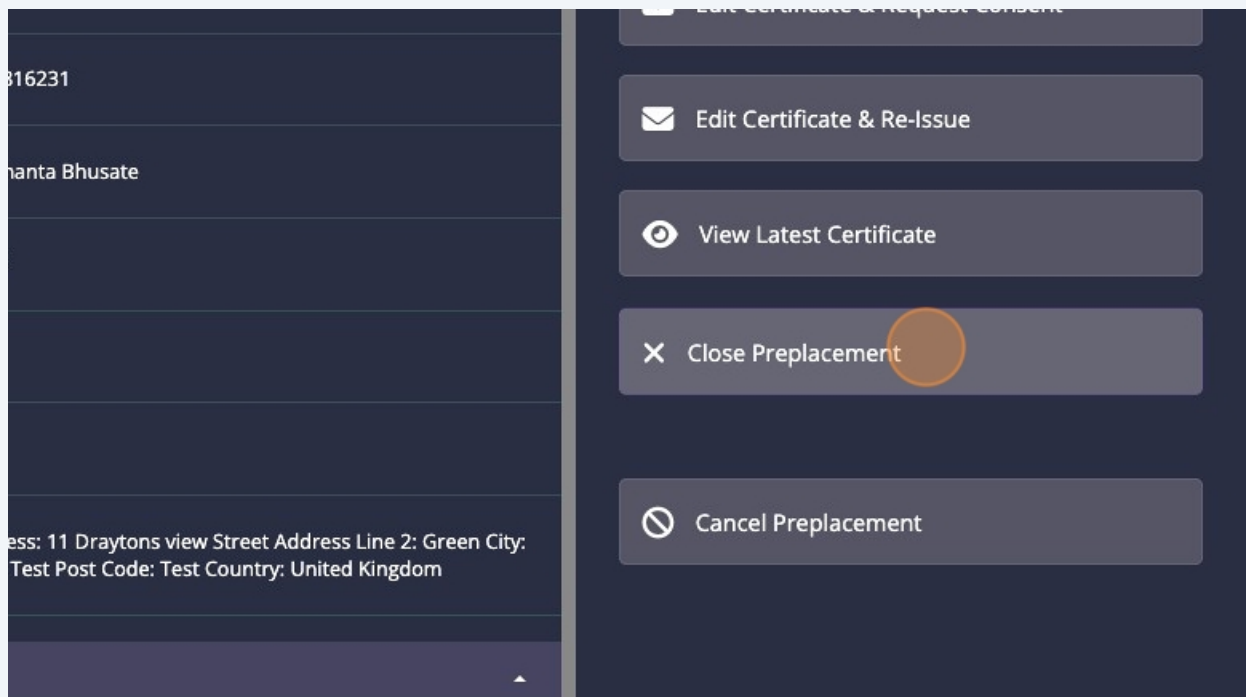
Street Address: 11 Draytons View Street Address Line 2: Green City,
Tes Region: Test Post Code: Test Country: United Kingdom

15 The certificate is sent to the selected people, and will now appear in the Documents tab for the person's record

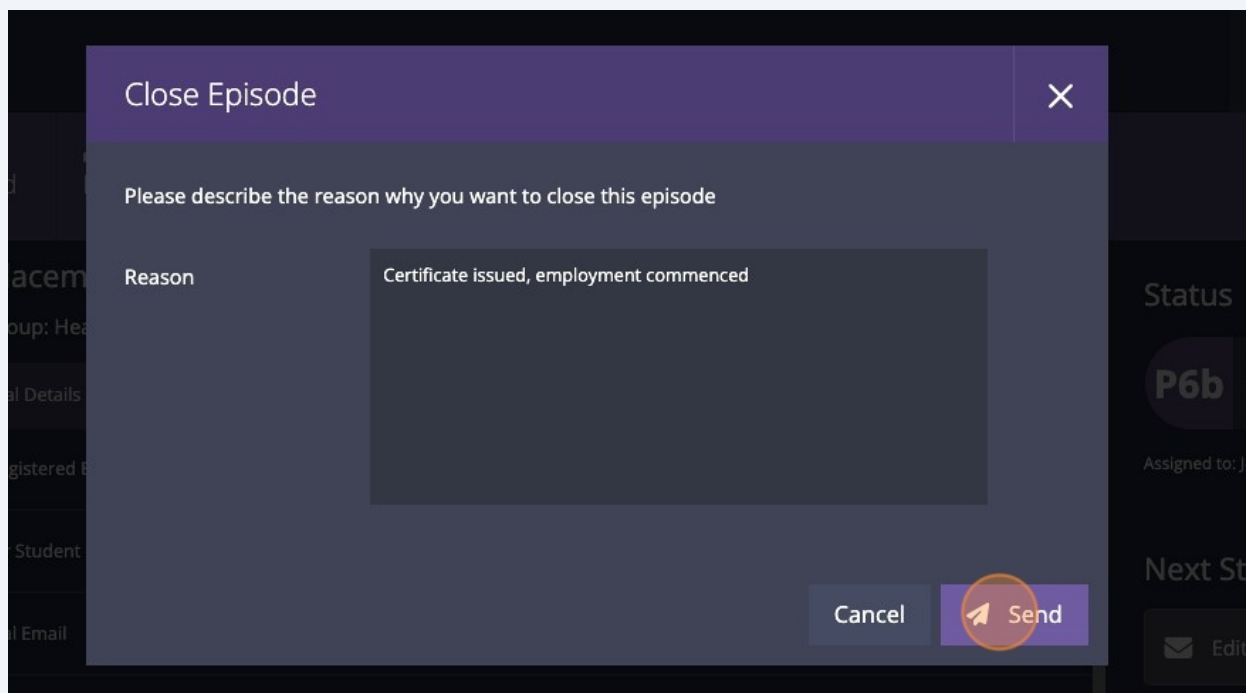
Closing the Episode

16 When the certificate is issued, you can make changes and re-issue it as many times as needed by clicking "Edit and Reissue" or "Edit and Request Consent". Closing the episode marks the episode as final, and stops further changes from being made to the certificate.

17 Click "Close Preplacement"



18 Give a description for the closure of the episode (e.g. "Person's employment has now commenced"), and click **Send**



19

The episode is now closed, and you can still find the certificate in the Documents library for the person.

Person

Organisation

Episodes

Journal

Documents

Communications

Absence Reviews

Notes

Preplacement Questionnaire Responses

Role Group: Healthcare Students

Personal Details

Your Registered Email Address

pal.bhusate@gmail.com

Work or Student Email

pal.bhusate@gmail.com

Personal Email

pal.bhusate@gmail.com

Mobile Phone Number

+44 (7) 810816231

Name

Ms. Kiran Shanta Bhusate

Date of Birth

01/01/1993

Gender at Brith

Female

Gender Identified with

Woman

Home Address

Street Address: 11 Draytons view Street Address Line 2: Green City.
Tes Region: Test Post Code: Test Country: United Kingdom

Study Programme Details

Status

X

Preplacement Closed

Closed 22/11/2024 at 2:30PM

Assigned to: Joshua Knight (OH)