


# Start a Case (Management Referral) Episode



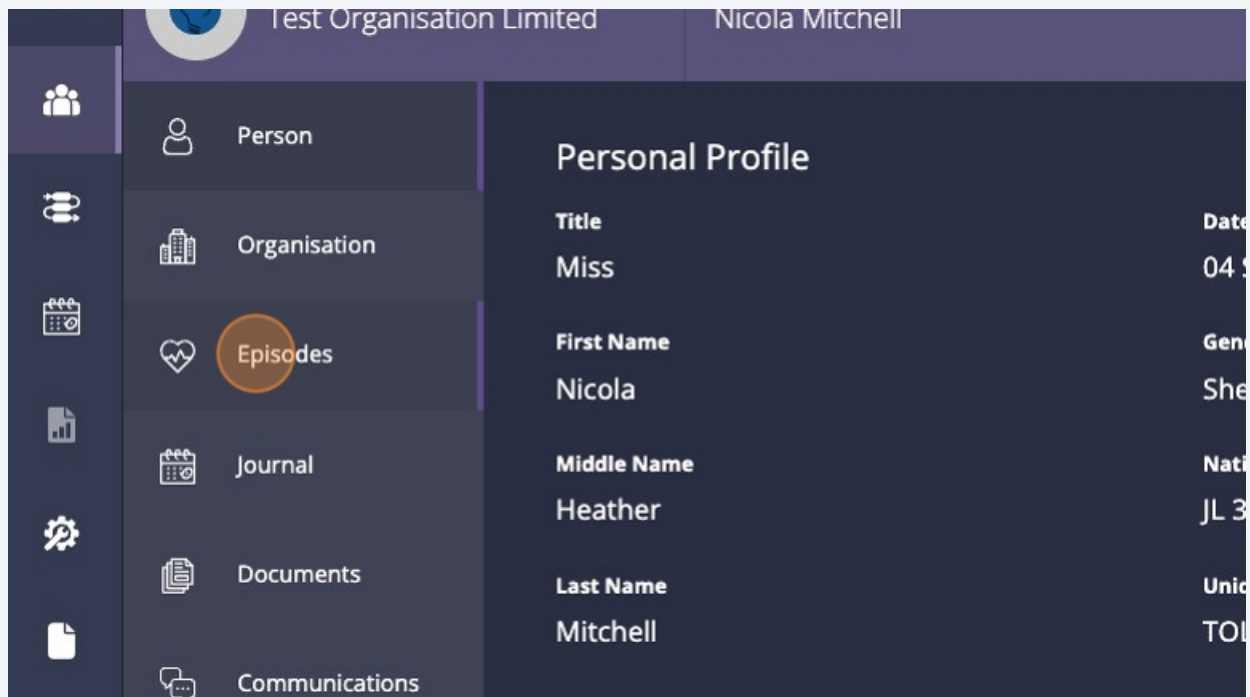
Learn how to start a new Case (Management Referral) episode for a person in MediWork

1 In MediWork, find the right person in the **People View**

2 Click on the person's row to open their record

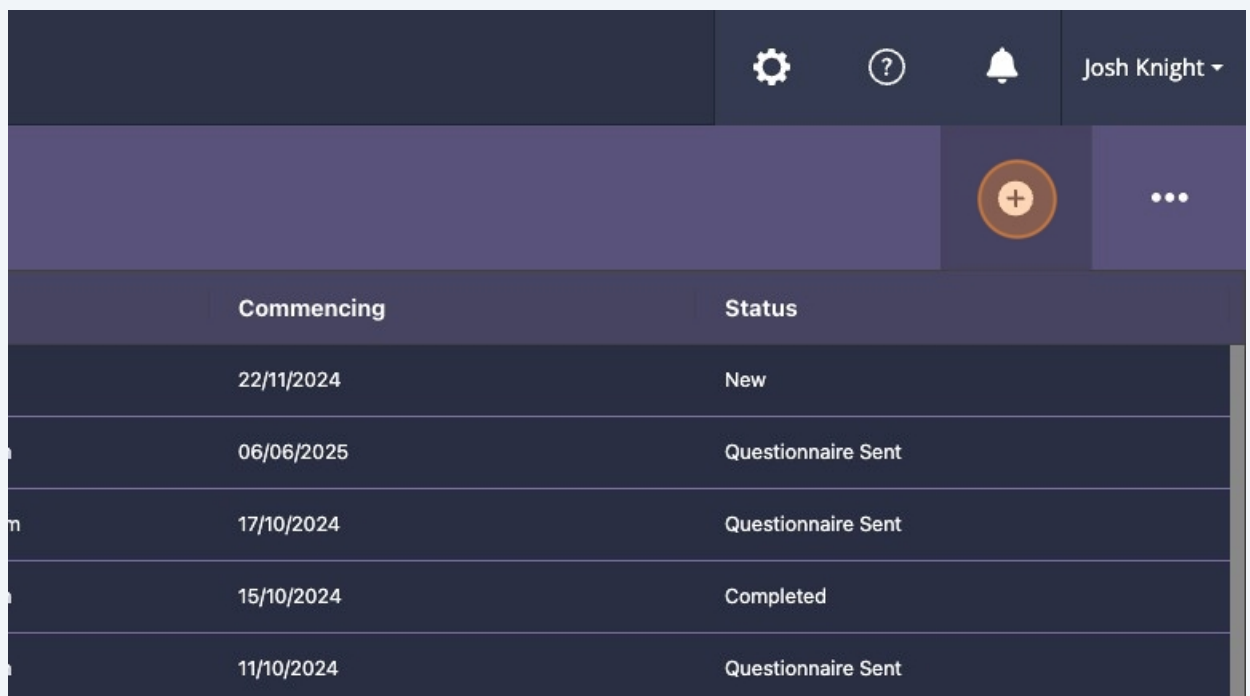
<div><div></div><div><div>Client</div><div>Test Organisation Limited</div><div></div></div></div>			
ID	First Name	Last Name	Created
TOL-000001	Rebeka	Mayer	01/09/2020
TOL-000002	Nicola	Mitchell	04/09/2020
TOL-000003	James	Grant	05/09/2020
TOL-000004	Ray	Liotta	05/09/2020
TOL-000005	Frank	Williams	05/09/2020
TOL-000006	Emily	Davies	05/09/2020

3 Click "Episodes"



The screenshot shows a user interface for a system. At the top, there is a header bar with a profile picture, the text "Test Organisation Limited", and the name "Nicola Mitchell". Below the header, there is a sidebar on the left with several icons. The "Episodes" icon, which is a heart with a pulse line, is highlighted with a red circle. To the right of the sidebar, there is a "Personal Profile" section with the following fields: Title (Miss), First Name (Nicola), Middle Name (Heather), and Last Name (Mitchell). To the right of these fields, there are partially visible fields for Date (04/05/2024), Gender (She), Nationality (JL 3), and Union (TOL).

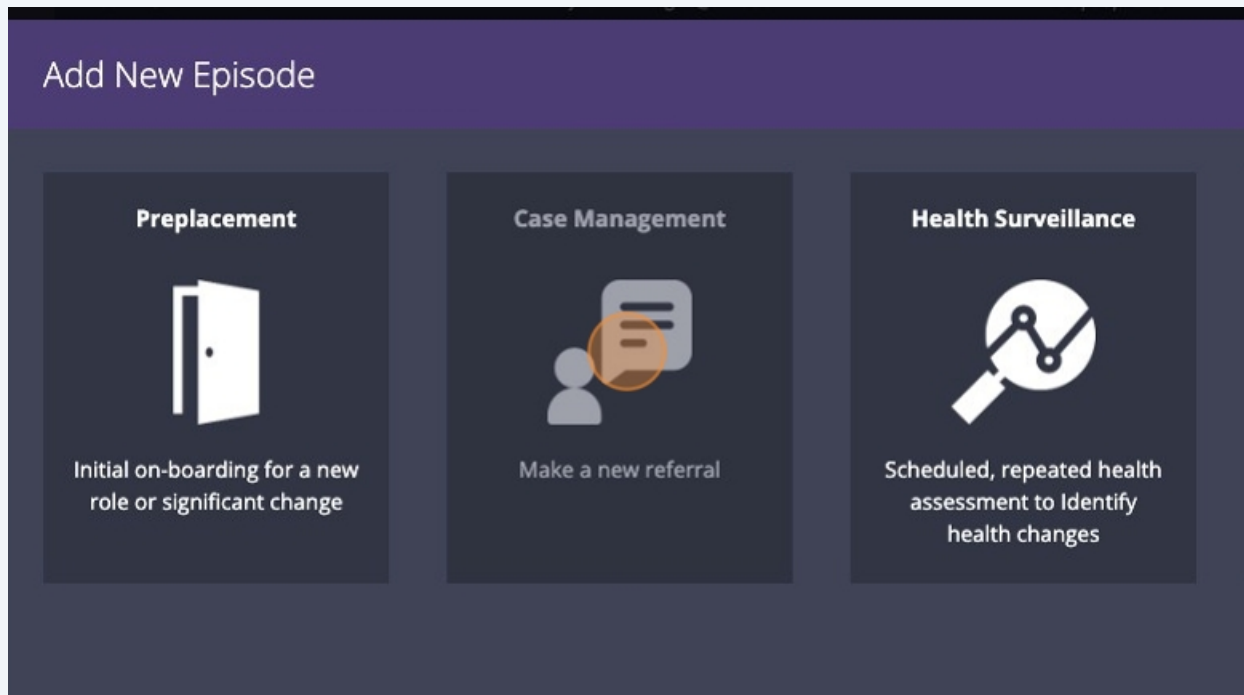
4 Click the "Add new Episode" icon



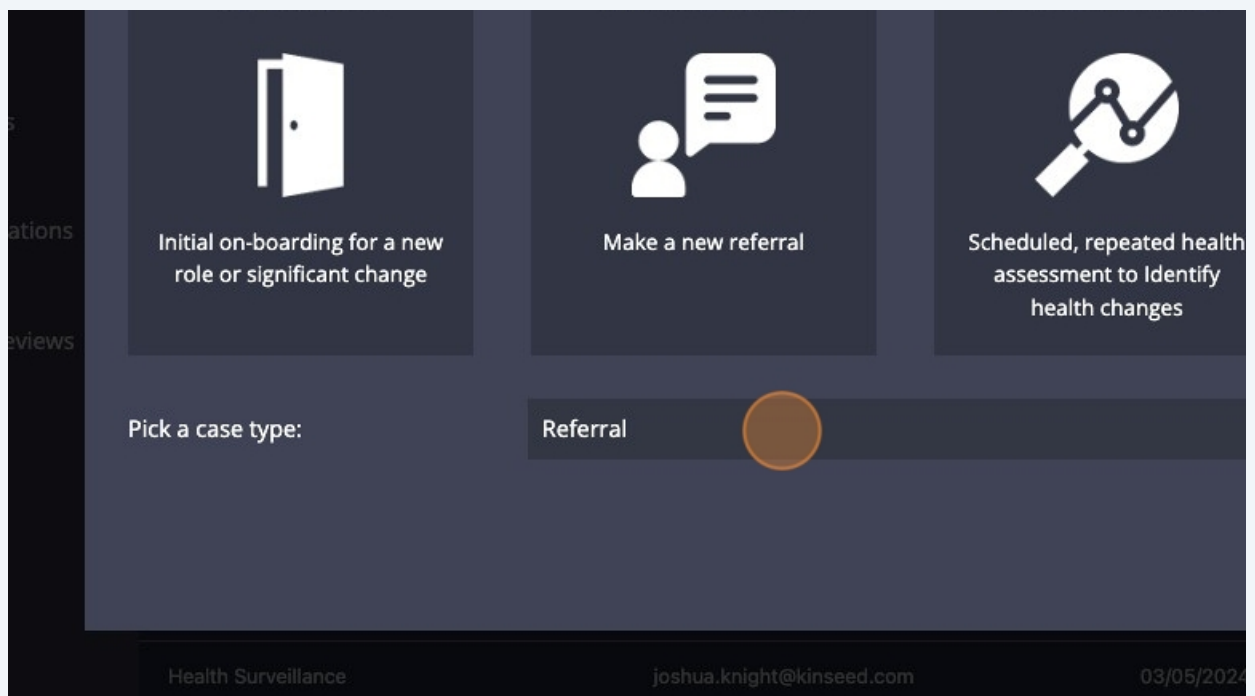
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Commencing	Status
22/11/2024	New
06/06/2025	Questionnaire Sent
17/10/2024	Questionnaire Sent
15/10/2024	Completed
11/10/2024	Questionnaire Sent

5 Click "Case Management"



6 From the dropdown list, select "Referral" as the type of case you are raising





Depending on your organisation, you may have only one type of case ("Referral"), or you may have many. This case type changes the questions asked about the case, but the process remains the same.

7

Click "Next"

The screenshot shows a software interface with a modal dialog box. The dialog has two buttons: "Cancel" and "Next". The "Next" button is highlighted with a red circle. The background shows a table with columns for dates and status.

	03/05/2024	Questionnaire Received
	01/05/2024	Open
	01/05/2024	Open
		Ready to Send Certificate

8

On the "Enter Case Details" page, add all the information about who is making the referral. If you are making the referral, you can leave the referrer details blank - they will be filled in on your behalf.

The screenshot shows the 'Enter Case Details' form with a sidebar on the left containing 'Case Details', 'Consent', and 'Files'. The main form area has the following fields:

- Referrer Last Name:** Knight
- Referrer Email:** support@kinseed.com
- Job Title:** Trainer
- Line manager details (if not the referrer):**
  - Name of line manager:** Pal Bhusate
  - Country Code:** 44
  - Contact No.:** 2084232244
  - Ext.:** 1
  - Email address:** pal@kinseed.com
- State any person who should receive a copy of the referral in addition to the referrer**
  - Additional Recipient - Job Role:** (empty)
  - Additional Recipient - Email:** (empty)
  - Additional Recipient - Name:** (empty)

9

Click "Job Details"

The screenshot shows the 'Enter Case Details' form with a sidebar on the left. The 'Job Details' option is highlighted with an orange circle. The main form area has the following fields:

- Referrer First Name:** Josh
- Country Code:** 44
- Referrer Phone:** 2084232244
- Referrer Last Name:** Knight
- Referrer Email:** support@kinseed.com
- Job Title:** Trainer
- Line manager details (if not the referrer):** (empty)

10

Confirm the person's Job Title, details about their role, and employment information

The screenshot shows a web application interface for entering case details. On the left is a dark sidebar with a menu containing 'Case Details' (selected), 'Consent', and 'Files'. The main content area has a light blue header with the title 'Enter Case Details'. Below the header, the form is organized into sections. The 'Current Department' section contains a text input field with 'Space Exploration'. The 'Length of service' section contains a text input field with '12Y'. The 'Brief description of duties' section contains a text input field with 'General miscellany and additional odds and ends'. To the right of these sections are three radio button options: 'Changing shifts - days/nights' (selected), 'Unsocial hours', and 'Irregular hours'. Below these are two text input fields: 'Number of work days/ week' with '5' and 'Number of hours each shift' with '8'. At the bottom of the main content area, there is a note: 'You can also provide job description as a file attachment'.

11

Click "Case Details"

This screenshot shows the same 'Enter Case Details' form as the previous one, but with a different focus. The 'Case Details' menu item in the left sidebar is highlighted with a blue circle. The form content is identical to the previous screenshot, showing the 'Current Department' as 'Space Exploration', 'Length of service' as '12Y', and 'Brief description of duties' as 'General miscellany and additional odds and ends'. The 'Work pattern' section shows 'Day shift only' as the selected option. The 'Number of work days/ week' is '5' and 'Number of hours each shift' is '8'. The note at the bottom remains the same: 'You can also provide job description as a file attachment'.

## 12 Fill in as much information as you can about why the case is being raised.

**Case Details**

**Consent**

**Files**

Consideration for University place  
Explore impact of health condition on work  
Fitness to return to work  
Frequent short term absence  
Long term absence  
Please clarify the health condition and it's effect on the employee's work  
Would like to ensure we are covering all bases for support and requirements i  
Other reason for referral or further comment

Hold control (Ctrl) to select multiple reasons for referral

**Summary of Referral**

Concerns over performance relating to recent work-related-stress

Please explain the reason for this referral being made

Do you wish a pre-consultation call to be arranged to discuss the referral?

☐ Yes ☒ No

What kind of consultation would you like to request?

OHP

Employee availability to attend face to face, video, telephone

No

Is any assistance needed for the appointment?

No

Any other information including how the issue(s) are impacting the employee's ability to work in their current role

No other information

Is the Employee currently at work?

☒ Yes ☐ No



You can select multiple items in the "Reason for Referral" box by holding down the Control (Windows) or Command (Mac) key on your keyboard

### 13 Click "Consent"

The screenshot shows the 'Enter Case Details' form. The left sidebar contains the following options: Referral Details, Job Details, Case Details, Consent (highlighted with an orange circle), and Files. The main content area is titled 'Reason for Referral' and lists several options: Concern about work related capability or performance, Concern about the effect of their work on the employee's health, Consideration for ill-health retirement, Consideration for University place, Explore impact of health condition on work, Fitness to return to work, Frequent short term absence, Long term absence, Please clarify the health condition and it's effect on the employee's work, Would like to ensure we are covering all bases for support and requirements i, and Otherreason for referral or further comment. Below the list is a note: 'Hold control (Ctrl) to select multiple reasons for referral'. At the bottom of the main content area is a section titled 'Summary of Referral'.

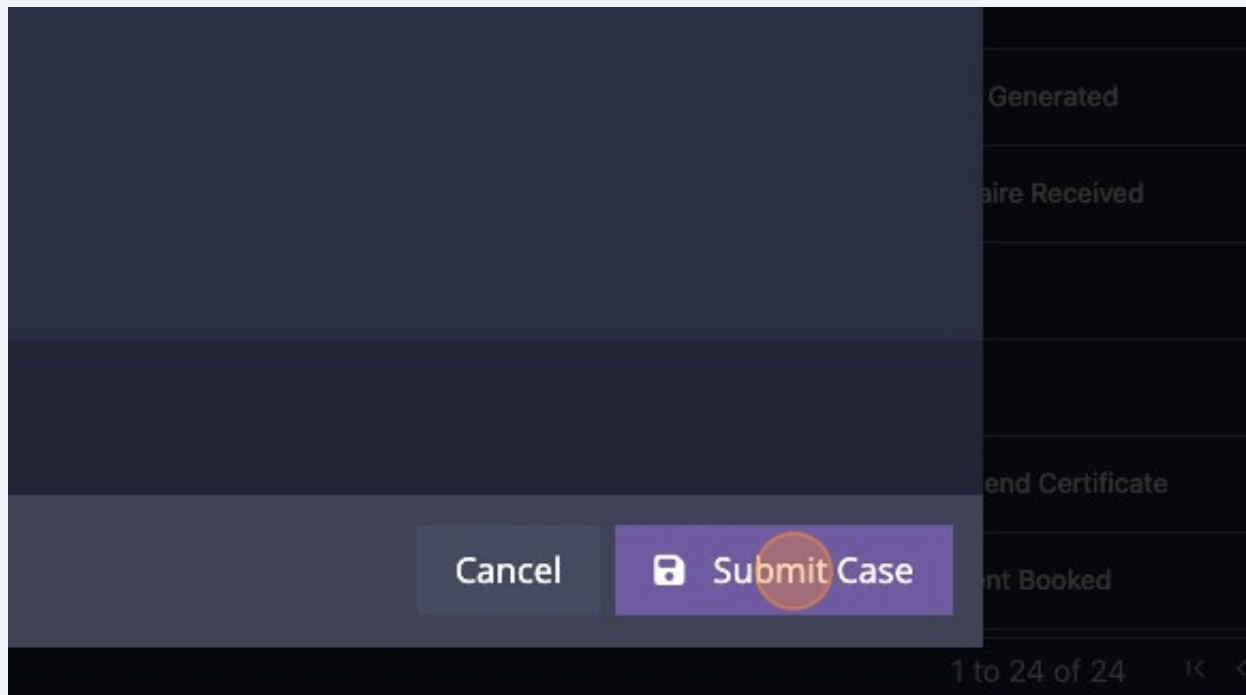
### 14 Confirm that you have received appropriate permission and consent to submit this case on behalf of the individual

The screenshot shows the 'Enter Case Details' form with the 'Consent' section selected. The form contains the following fields and options:

- I hereby confirm that the employee has consented to be referred for an occupational health assessment**  
☒ Yes ☐ No
- Has the Employee seen the referral?**  
☒ Yes ☐ No
- I confirm I understand that to meet the requirements of the data protection legislation, and in keeping with guidance published by the health professional bodies, a copy of the report will be provided to the employee. The employee will be offered the option of a copy being sent to them at the same time it is sent to the employer, or alternatively before it is sent to the employer**  
☒ Yes ☐ No
- Date Started**  
22/11/2024



**15** Click "Submit Case"

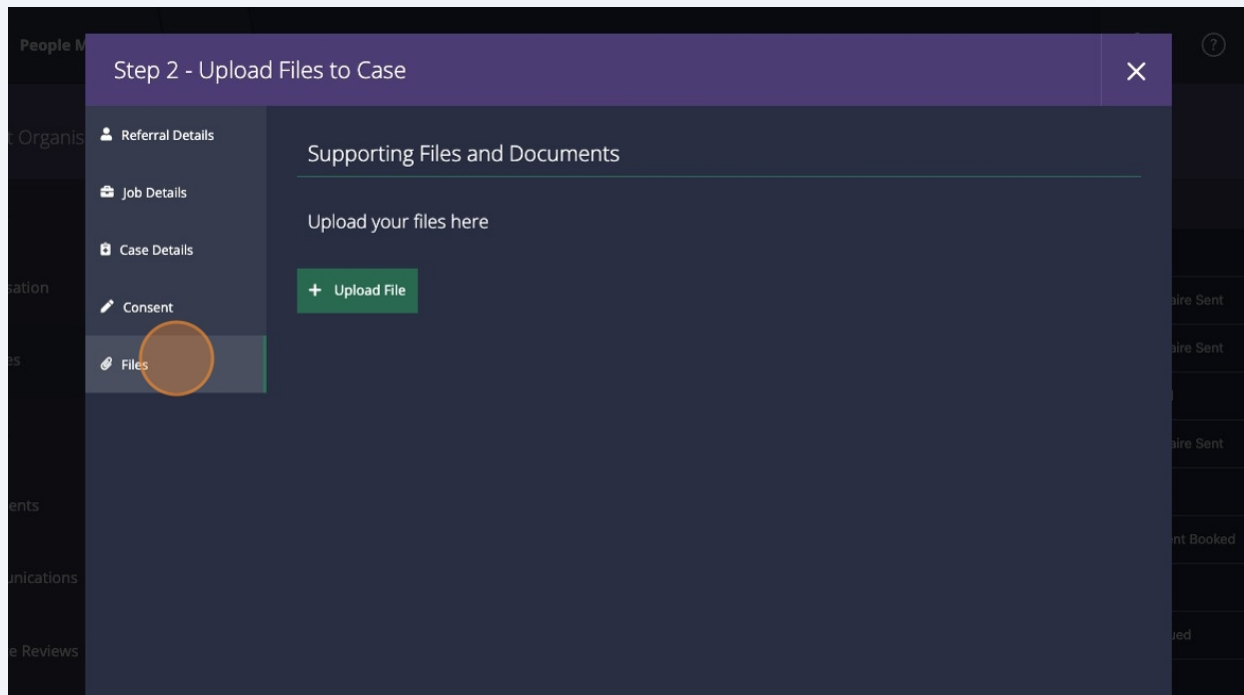


**16** The case will then save, and the **window will stay open**.

At this stage, the case has been made, and you can upload any additional files you may need to support this case, or make any other changes required before allowing the Clinical team to process the case.

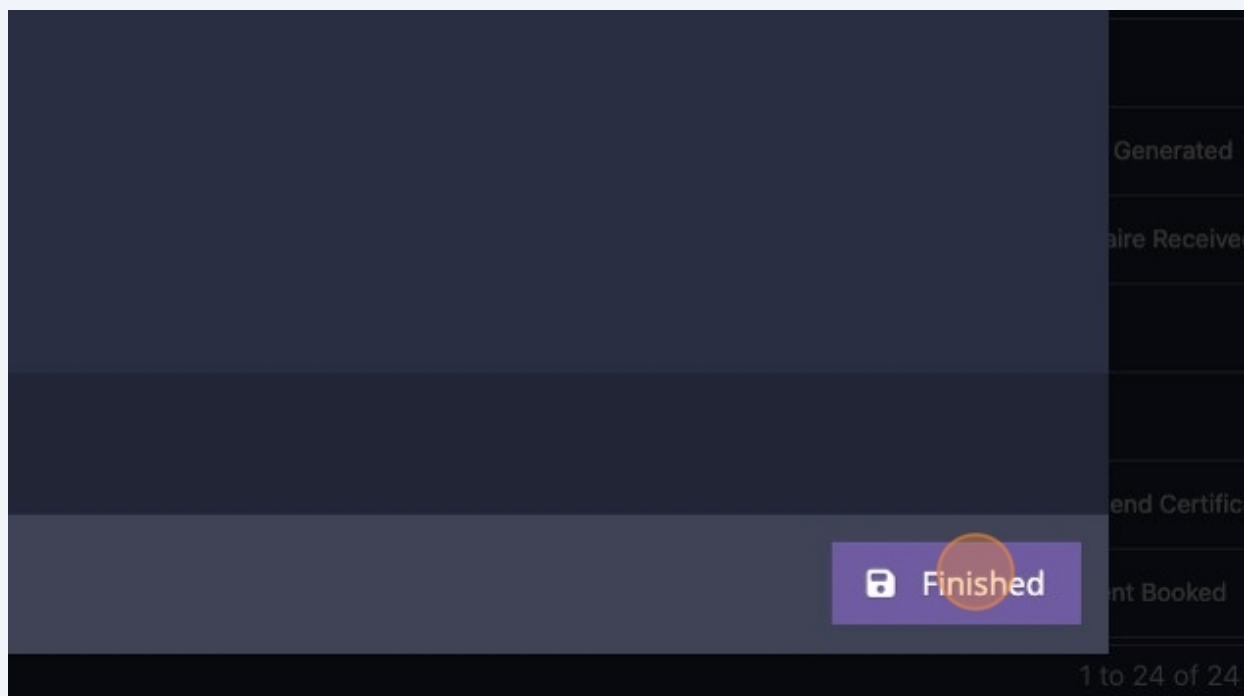
17

To attach files (if required) to the case, click the "Files" tab, and use the "Upload File" button to attach them



18

When you're done reviewing and updating the case details, click "Finished"



19

The case is now raised, and will open in MediWork. You can return to this case at any time by visiting the "Episodes" tab in the person's record.

**Referral Case Review**

**Case Details**

[View Case Management Referral](#)

[View Clinical Records](#)

**Completed Questionnaires**

There are no completed questionnaires yet.

**Appointments**

There are no appointments yet.

**Status**

**C0 New**  
Case raised

Assigned to: Unassigned [assign to me](#)