

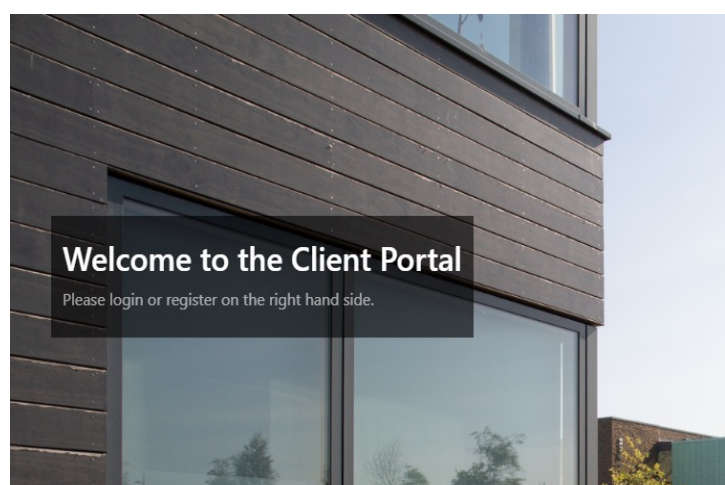
You can now request Management Referral appointments via Alert Health's new Client Portal.

1.0 Logging In

To sign in to your Alert Health Client Portal, please use this link: [Meddbase Occupational Health Portal](#)

The first screen will ask you to sign in. If this is your first visit to the portal, please select 'Forgot Password' and follow the instructions to set a password and gain entry.

If you have any difficulty accessing the system, please contact service@alerthealth.co.uk for further guidance.



Alert Health Client Portal

Sign in

Please sign in with your email address and password

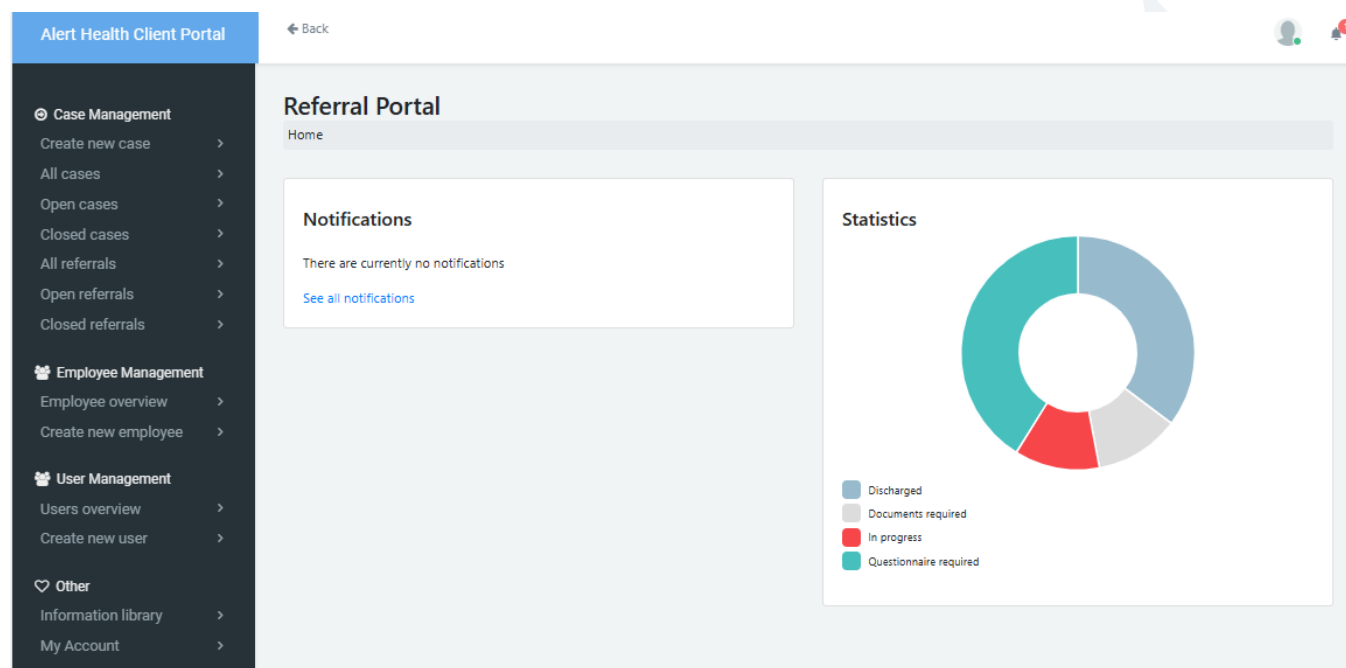
[Forgot password?](#)

Sign in

Register here

2.0 Client Portal Dashboard

The menu bar on the left-hand side will help you navigate the system and guide you to where you need to be. There are different levels of access that can be granted to Client Portal users. This will dictate the menu layout.



Alert Health Client Portal [← Back](#)

Referral Portal
Home

Notifications
There are currently no notifications
[See all notifications](#)

Statistics

Donut chart showing the distribution of cases:

- Discharged (Blue)
- Documents required (Grey)
- In progress (Red)
- Questionnaire required (Teal)

3.0 Creating a New Referral

3.0.1 Create A New Case

Select 'Create new case' from the navigation menu on the left. Search for or select the relevant employee from the team list.

Alert Health

← Back

Referral Portal

Home

Case Management

- Create new case
- All cases
- Open cases
- Closed cases
- All referrals
- Open referrals
- Closed referrals

Employee Management

- Employee overview
- Create new employee

Other

- Information library
- My Account

Notifications

There are currently no notifications

[See all notifications](#)

Create New Case

Home / Create New Case

Please search for the employee you wish to refer using the fields below. If you cannot find the employee you are searching for, you may register a new employee.

Employee Number:

Personal Email Address:

First Name:

Work Email Address:

Surname:

Date of Birth: Day Month Year

Required

Number	Name	Department	Mobile	Date of birth	Email
	Rachel Edmunds	Admin	07540 694220	1/1/2000	-2@hotmail.com, -2@hotmail.com
	Test Portal	Admin	07540 694220	5/2/1992	s@hotmail.com, e@hotmail.com

Can't find the employee you are looking for? [Click here](#) to register a new employee.

3.0.2 Enter Employee Details

Review the employee's details, ensuring contact details are up to date. Click continue to proceed.

Please note: The email address entered in 'work email address' will be the one used to contact the employee. If the employee is absent, please consider updating this to an email address the employee will have access to.

Refer Employee

Please confirm the employee's details before proceeding.

Employee number:

Personal email address:

Title*: Sex:

First name*:

Surname*:

Gender Identity and Pronouns:

Mobile phone number*:

Department:

Division:

Job title:

Work email address*:

Date of Birth*:

Address details*:

Address Line 2:

Address Line 3:

TEST

Test

* Required

3.0.3 Choosing an appointment type

Select 'Management Referral'.

The screenshot shows the 'Create New Case' form. On the left is a dark sidebar with a 'Management' menu item highlighted. The main content area has a header 'Create New Case' with a breadcrumb 'Home / Create New Case'. Below this is a teal box stating 'Selected employee: Rachel Edmunds' and 'Please select your required appointment type from the list'. A search bar contains 'Management Referral' with a right arrow. A 'Previous step' button is below. A modal window titled 'Select a Case Title' is open, showing 'Management Referral' with a right arrow.

3.0.4 Complete a referral form

Complete the management referral form, populating all mandatory fields. Progress through each page by clicking 'Next'. Add sickness absence history and background information. Include any additional questions specific to the employee's absence.

The screenshot shows the 'Referral form' page. The breadcrumb is 'Home / Cases / Referral form'. A section titled 'Points to consider when completing a management referral request: 1 / 4' contains four numbered instructions. Below is a section 'Detail provided within our report' with a list of points for the clinician's report. At the bottom are buttons for 'Prev', 'Save for later', and 'Next'. A progress bar at the very bottom shows the first step is complete.

The screenshot shows the 'Employee Details 2 / 4' form. It includes fields for Department, Job Title, Time in current post, and Time with company. A 'NATURE OF WORK' section has checkboxes for Office based/territorial, Heavy manual, Light Manual, Safety Critical Work, Driving, Other, Full-time, and Part-time. There are checkboxes for 'Have you attached a job description?' and 'GP / SPECIALIST REPORT'. A 'SICKNESS ABSENCE HISTORY' table is present with columns for Date (From), Date (To), No. of days, and Reason of absence. Below this is a 'REASON FOR REFERRAL' section with checkboxes for Prolonged sickness absence, Repetitive short-term absence, Injury at work, Concerns about drug or alcohol abuse, Safety concern, and Performance concerns. A 'BACKGROUND INFORMATION' section has a text area. At the bottom are 'ADDITIONAL QUESTIONS' and 'ADDITIONAL REQUIREMENTS' sections.

3.0.5 Add Appointment Request Details

Add PO or company reference. Advise employees availability to attend. If the report is to be sent to another person within your company, please provide details in the 'Consent' section.

Home / Cases / Referral form

4 / 4

Please advise the PO for this appointment*

type here

Please advise if you have a preferred timeframe for the appointment, including any restrictions. If flexible,

type here

Please indicate if the report should be sent to someone within your organization other than the referrer

Yes: (if so, generate details to be populated)

REPORT TO BE SENT TO (only complete if different from referrer)

Consent:

Name:

type here

Job Title:

type here

Telephone:

3.0.6 Add Supporting Documents

Upload the employee's job description and any supporting documentation here. Click 'Send referral' to submit your referral to Alert Health for booking.

Attach Documents

Home / Cases / Attach Documents

Comments

Browse

Note that once you upload a document it cannot be removed!

Attach document

File name	Author	Comment	Date
No documents uploaded yet.			

Please ensure you have completed the steps below

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.

Previous step

Cancel referral

Send referral

3.1 Exporting a PDF Copy of Referral

To export a PDF copy of your referral, navigate to 'View open cases'. Select the relevant case to open it. Open referral letter PDF to view, save or print.

Please note: Employees should be provided with a copy of the referral form prior to attending their appointment.

Alert Health Client Portal

Back

Home / Cases

Search for cases

Open cases

-- Select department --

-- Select division --

Search

Case ID	Employee	Case Opened	Case Closed	Status	Case Reason	Last Update
2473175	Edmunds, Rachel	20/8/2025		Open	Management Referral	20/8/2025
2473071	Edmunds, Rachel	20/8/2025		Open	Management Referral	20/8/2025

1

Case Details

Case ID: 2473175

Status: Open

Reason: Management Referral

Case Opened Date: 20/8/2025

Case Closed Date:

Employee Details

Employee Name: Rachel Edmunds

Employer Name: LifeScan Scotland

Employee ID:

Department:

Referrals

Referral ID	Referred by	Referral date	Modified date	Status	Booked	Attended	Complete	Documents
29527507	Edmunds, Rachel	20/8/2025	20/8/2025	Referral made				Hide documents Referral letter.pdf

1

3.2 Open Cases

Once submitted, the referral request will be triaged and booked by the Alert Health team. The attending employee will be contacted with appointment details.

Cases

Home / Cases

Search for cases

All cases

-- Select department --

-- Select division --

Search

Case ID	Employee	Case Opened	Case Closed	Status	Case Reason	Last Update
2447139	Edmunds, Rachel	1/5/2025		Open	Management Referral	1/5/2025
2446874	Edmunds, Rachel	30/4/2025		Open	Management Referral	30/4/2025
2446847	Edmunds, Rachel	30/4/2025		Open	Management Referral	30/4/2025
2446841	Edmunds, Rachel	30/4/2025		Open	Management Referral	30/4/2025
2446830	Edmunds, Rachel	30/4/2025		Open	Management Referral	30/4/2025
2445693	Edmunds, Rachel	25/4/2025		Open	Management Referral	25/4/2025
2445688	Edmunds, Rachel	25/4/2025		Open	Management Referral	25/4/2025
2445682	Edmunds, Rachel	25/4/2025		Open	Management Referral	25/4/2025
2442321	Edmunds, Rachel	8/4/2025		Open	Management Referral	8/4/2025
2439824	Edmunds, Rachel	26/3/2025	8/4/2025	Closed	Management Referral	8/4/2025

1

3.3 Referral Portal

Once the appointment has taken place and the report is ready for you to view, it will become available on the portal for you to view and export.

Referral Portal

Home

Notifications

Referral

Referral 27719791 for Edmunds, Rachel has been released.

See all notifications

Referral Details

Referral ID

27719791

Status

Referral closed

Patient Review

Authorised (report viewed at: 1/5/2025 - 4:23PM)(report sent at: 1/5/2025 - 4:21PM)

Employee

Miss Edmunds, Rachel

Referred by

Booker, Company

Employee number

Mobile phone

07540 694220

Date of Birth

1/1/2000

Department

Admin

Referral date

1/5/2025 - 3:18PM

Referral Messaging

Available message feeds

Start new feed

Miss Edmunds, Rachel 01/05/2025 - 4:23PM

The employee downloaded the report

1

Edmunds, Rachel 01/05/2025 - 3:59PM

The appointment has been booked on Alert Health Ltd at 02/05/2025 10:15:00 with MacLennan, Zoe

1

Miss Edmunds, Rachel 01/05/2025 - 4:23PM

The employee downloaded the report

Write a message

Add new message

Referral Documents

File name	Author	Comment	Date
Occupational Health Assessment Report.pdf	Edmunds, Rachel		1/5/2025 - 4:21PM
Referral letter.pdf	Mr Booker, Company		1/5/2025 - 3:28PM

Related Appointments

Type	Time/Date	Status	Clinician	Site
Consult in Clinic	2/5/2025 - 10:15AM	Attended	MacLennan, Zoe	Alert health Ltd

alerthealth.co.uk

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