

Health Management HML Online User Guide III Health Retirement

Client: Cabinet Office

2018



Getting Started

You can access the HML Online portal at <https://portal.healthmanagement.org.uk>.

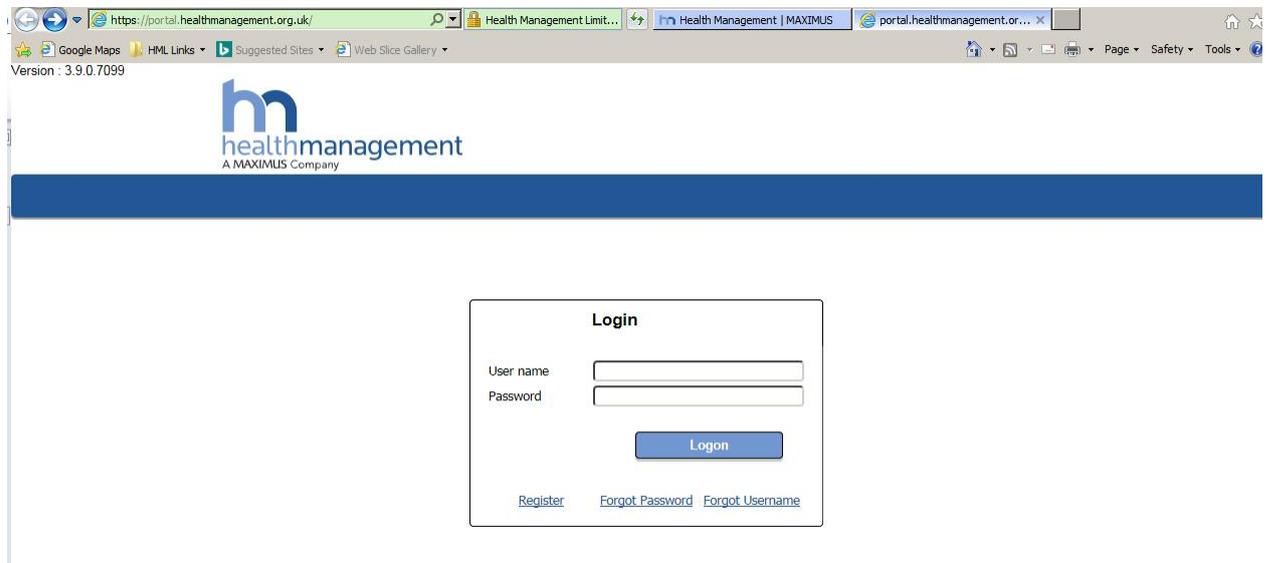
Before using the system you must register for an account.

To register for an account, open your web browser and type the following address into the address bar at the top of the screen.

<https://portal.healthmanagement.org.uk>

Press Enter – you will be taken to the log in screen below.

If you don't see this screen then please check the address carefully, it must be typed into the address bar at the top of your web browser exactly as it appears here.



Click the Register button.

You will be taken to the registration screen shown below. Enter the Verification code: and then use tab or click out of the Verification code box

Please complete the registration form using your own details and work email address.

◀ Required Fields

Verification Code

Company Name

Location

Title

First Name

Surname

Work Address

Work Post Code

Job Title

Contact Telephone No

Email Address

Email Address Confirmation

User name

Enter New Password

Confirm Password

Password Rules

- ✘ At least one digit (0 to 9)
- ✘ At least one upper case letter (A to Z)
- ✘ At least one lower case letter (a to z)
- ✘ At least one symbol from ! # \$ @ _ + , ? [] . -
- ✔ No more than 2 repeated consecutive characters
- ✔ Minimum of 10 characters
- ✔ Maximum of 100 characters
- ✔ No common words
- ✔ Must not include your username
- ✔ Passwords must match

'Register Now' button will only be enabled when 10 green ticks are shown above

I'm not a robot 

reCAPTCHA
Privacy - Terms

If everything has been entered correctly the screen should show your company name next to 'Company Name' and two further drop down boxes will appear; 'Select your manager' and 'Location'. **Please select SMA HML as your manager.** If you select the incorrect manager, your cases may be viewed by someone in another government department, so please take care.

If you receive a message stating 'Invalid Verification Code' please check your code and try again.

The Location drop down contains a pre-programmed list of locations entered by your agreed before launch. Please make an appropriate selection. Your email address must be your work email address. We can accept registrations only from email domains that have been previously registered with us for your organisation.

Note : Your password should be at least 8 characters long and contain a mixture of upper & lower case letters and at least one number or special character (* ! % \$ £ @ # etc). For example *L3tMe1n!* (do not use this!!)

Once you have completed the form including the click the Register Now button. You will receive an email from online@healthmanltd.com. This contains a link which you must click to activate your account. You will not be able to log into your new account until you activate it like this.

Once your account is activated please visit <https://portal.healthmanagement.org.uk> or follow the link on the activation screen to log on.

Online Referrals - Login

User name

Password

[Forgot password](#)

[Forgot username](#)

At the logon screen enter your username and password as per your registration and click the Logon button.

Once successfully logged in you will be taken to the dashboard. You may choose your next destination from here. You can always return here from any screen by using the navigation link to the Dashboard at the top of the screen in grey.

[Make Referral](#) | [Track Referrals](#) | [Saved Referrals](#) | [Approval Queue](#) | [Request Questionnaire](#) | [Track Questionnaires](#) | [Management Information](#) | [User Admin](#)

Welcome to Health Management Online

Make Referral

This form is designed for use by Human Resources professionals or Line Managers when referring a member of staff for occupational health assessment. It is important when making such referrals to include as much background information as possible to enable the clinical staff at Health Management to have a complete picture. Please feel free to telephone us if there is anything you wish to discuss before sending the referral and we will be pleased to advise you.

Track Referrals

This section provides a live snapshot of all cases referred to the OH service and allows you to drill down to view all the activity and progress of a case. This includes the history of Management Reports linked to each case which can be viewed or downloaded in Pdf form. Data can also be sorted or exported to excel.

View Saved Referrals

This section enables you to view all referrals that have been initiated, but not yet submitted. Please note that saved referrals will only be held for 30 days, after this time they will be automatically deleted for security reasons.

Request Questionnaire

This section provides various risk assessment questionnaires for completion. In order to protect sensitive personal data, we ask that the form be initiated by Human Resources professionals or Line Managers, then subsequently completed by the individual concerned. This is essential in enabling us to follow appropriate user name & password protection procedures.

Track Questionnaires

This section provides a live snapshot of all questionnaires referred to the OH service and allows you to check the outcome/download the "fit" certificate. If the questionnaire is still being assessed, you are able to drill down and view all the activity and progress to date. Data can be sorted or exported to excel.

Making a Referral

Click on the 'Make a Referral' link either from the blue down menu along the upper section of the screen.

Select the type of referral that you wish to make.

You will be taken to the referral form as shown below. The actual form you see may be a custom version of this developed for your organisation. The form is split into several tabs.



IHR1-P1 - Referrer's Details

01 Referrer's Details	02 Members Details	03 Reason for referral	04 Information required by HML Ltd	05 Supporting documents	06 Declaration
All completed fields must contain at least 1 alphanumeric character.					
Required Fields					
Title	Mrs				
Name	Michaela Oliver				
Company/Organisation	CSM Demo				
Address for us to reply to	Ash House Ringmer				
Postcode	BN8 5NN				
Telephone Number	0845 504 1000				
Employer Location Code					
E-mail Address for communication from SMA	xMichaela.Oliver@healthmanltd.com				
Purchase Order No					
Go to Next Step					

Important Note:

For security reasons your session will expire after 20 minutes. Therefore if a case has been initiated and not submitted within that time, upon submission you will be ejected from the portal back to the login page and all information will be lost, so please save your work regularly. You can use the 'Save For Later' button at the bottom of any tab on the referral form to save a part completed form and so avoid losing your work, you may then retrieve and continue with the submission.

Progress through the steps completing all required fields (marked with a small blue triangle to the right hand side of the field).

At step 5 you may attach supporting documents by clicking browse and selecting a file from your computer in the same way as you might attach a file to an email.

IHR1-P1 - Supporting documents

01 Referrer's Details	02 Members Details	03 Reason for referral	04 Information required by HML Ltd	05 Supporting documents	06 Declaration
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All completed fields must contain at least 1 alphanumeric character.

Important notice: Please take care to use the appropriate boxes in the correct order below. Please provide each document newest date first. Please note the application will be returned for resubmission if it contains duplicates or both sides of relevant pages have not been supplied.

Please ensure the documents are attached in the following order:
 Document 1: Members handwritten/typewritten Application Form
 Document 2: Reports to Management from the OH provider
 Document 3: Clinical Records – Consultation Notes
 Document 4: Reports from members Dr/Specialist that have been obtained by the OH provider
 Document 5: Medical reports provided my the member

Document 1 Cannot exceed 10 megabytes(mb)	<input type="text"/>	Browse...	Clear
Document 2 Cannot exceed 10 megabytes(mb)	<input type="text"/>	Browse...	Clear
Document 3 Cannot exceed 10 megabytes(mb)	<input type="text"/>	Browse...	Clear
Document 4 Cannot exceed 10 megabytes(mb)	<input type="text"/>	Browse...	Clear
Document 5 Cannot exceed 10 megabytes(mb)	<input type="text"/>	Browse...	Clear

[Go to Next Step](#)

Note: If you choose to use the “Save For Later” feature we will not keep any attached documents for you. You should only attach documents to a referral just before you are ready to submit it.

Note: Supported document formats are Word 2003, Word 2007, Word 2010, Excel 2003, Excel 2007, Excel 2010, Text and PDF. Submitting any other format, particularly older formats of office documents, may delay your referral as the Health Management admin team will be unable to process the case.

Click the Submit Referral button on the last tab to send your referral to Health Management.

Referrals: Rejected referrals

Dealing with a rejected referral

Sometimes a referral can be rejected by Health Management.

If one of your referrals is rejected then you will receive an email along the lines of the example below.

From: HML Online
Sent: Thursday, December 06, 2012 10:12
To: Michaela Oliver
Subject: HML: Rejected IHR referral
Importance: High

Dear Michaela,

Your IHR referral for Tom Smith has been rejected for the following reason:

Incomplete medical information provided.

You can find this referral in the "Saved Referrals" section of the portal website, from here you can make any amendments and resubmit the referral.

Kind Regards

Health Management Ltd

This email was sent from an unmanned mailbox.

If your referral is rejected it will appear in the Saved Referrals menu as below.

From here you can open, edit and re-refer or delete the referral.

The screenshot shows the Health Management portal interface. At the top left is the logo for 'healthmanagement' with the tagline 'medical advice for business'. To the right of the logo are links for 'Dashboard', 'Logout', and 'CSM Demo Petra Tilbury, J'. Below the logo is a dark blue navigation bar with links: 'Make a Referral', 'Track Referrals', 'Saved Referrals', 'Request a Questionnaire', 'Track Questionnaires', and 'My Account'. The main content area is titled 'Saved Referrals' and contains a sub-section 'Rejected Referrals'. Below this sub-section is a paragraph explaining that these are referrals rejected by the health management team or by the line manager, with an email detailing the reasons. A table follows, showing a single referral for Peter Parker, a Management Assistant, with postcode SE1 6TR. The table has columns for 'Re-Refer', 'Delete', 'FirstName', 'Surname', 'Position', and 'Postcode'. Below the table is a red message: 'You currently have no unsubmitted saved referrals.' At the bottom left of the content area is a 'home' button with a checkmark.

healthmanagement
medical advice for business

Dashboard | Logout | CSM Demo Petra Tilbury, J

Make a Referral | Track Referrals | Saved Referrals | Request a Questionnaire | Track Questionnaires | My Account

Saved Referrals

Rejected Referrals

These are referrals which have been rejected by the health management team or by your line manager, you will have received an email detailing the reasons for this.

		FirstName	Surname	Position	Postcode
Re-Refer	Delete	Peter	Parker	Management Assistant	SE1 6TR

You currently have no unsubmitted saved referrals.

home ✓

You will find a copy of the rejected referral(s) in the Saved Referrals section as shown in the screenshot above. You may use the Re-refer link to open your referral to allow you to edit it and resubmit it to us. Note that if the reason for rejection was the use of an incorrect form then you will need to start over with the correct form rather than use this feature.

We will keep rejected referrals for 30 days in this section, again no prior notice will be given when this is deleted.

Note: If you do not have any rejected referrals then the Rejected Referrals section of this screen will be hidden.

Tracking Cases

Once you have submitted a referral and it has been accepted and triaged by Health Management then you can track the progress of your case, there may be a delay of a couple of hours whilst this process is occurring in which you won't be able to see the case. You will receive an automated email when we accept the case.

Tracking Referrals

Click on the Track Referrals button in the blue menu bar at the top of the screen.

The screenshot shows the 'Track Referrals' interface. At the top is a dark blue menu bar with the following items: Make Referral, Track Referrals, Saved Referrals, Approval Queue, Request Questionnaire, Track Questionnaires, Management Information, and User Admin. Below the menu bar is the 'Track Referrals' section. It features a search box labeled 'Search Open and Closed Cases' with a 'Search' button and an 'Export Referrals' button. Below the search area are three tabs: 'Open Cases', 'Closed Cases', and 'Pending Triage'. To the right of the tabs is a 'Filter by User:' dropdown menu set to 'All'. Below the tabs and filter is a table with the following columns: Employee, Case Number, Division, Location, Department, Received, Status, Case Type, Owner, Recall Date, and View. The table contains six rows of data, each with a 'View' link in the final column.

Employee	Case Number	Division	Location	Department	Received	Status	Case Type	Owner	Recall Date	View
test, test	CSM/OBC1/PT1/406	Division A	Location C	Department B	16/10/2016 00:00:00	Awaiting Employee Consent	Mgmt. Referral	Simon Reynolds		View
test, test	CSM/OM/PT1/256	CSM Demo	Birmingham	Customer Services	17/03/2015 11:33:11	Triage Next Action - IMA Required	Mgmt. Referral	Simon Reynolds		View
Bloggs, Joe	CSM/OM/JxN/250	CSM Demo	Ringmer	Customer Services	30/10/2014 00:00:00	Triage Next Action - IMA Required	Mgmt. Referral	Simon Reynolds		View
test, test	CSM/OM/CJ7/196	CSM Demo	Birmingham	Customer Services	02/04/2014 00:00:00	Triage Next Action - IMA Required	Mgmt. Referral	Simon Reynolds		View
Parker, Peter	CSM/OM/JW2/95	CSM Demo	London	Customer Services	14/05/2013 00:00:00	Triage Next Action - IMA Required	Mgmt. Referral	Simon Reynolds		View
Baker, Tom	CSM/OM/MD/50	CSM Demo	Birmingham	Customer Services	29/11/2012 08:31:54	Triage Next Action - IMA Required	Mgmt. Referral	Simon Reynolds		View

Referral cases are split between Open and Closed cases. You may switch between these views using the tabs at the top of the table. If you have permission or are placed on the hierarchy to view cases created by your colleagues then you can use the 'Filter by User' drop down at the top right of the grid to simplify your view by limiting it to referrals made by a particular person.

You may use the search box at the top of this section to search directly by surname or case number for a particular case.

Note: search results will only display cases you have permission to view.

You can sort the table by clicking on any column heading. You can filter/search by any column by typing into any of the white boxes just below the column headings. *These boxes are known as the search/filter boxes.* You may search/filter by multiple columns. To clear a search / filter simply delete the contents of the relevant search/filter box.

If you are in the closed cases view then you should note that you are shown your own cases by default. If you have the necessary permission in the system you can use the

Filter by User drop down at the top right of the grid to view closed cases belonging to your colleagues.

In the closed cases view you have the option to 'Re-refer' any case. This simply starts a new referral using the same form as the original case and completes section 2, employee details, for you.

Note: Even if you have the necessary permissions to view cases from other users there is no facility to view All closed cases. This limitation is in place for performance reasons as a view of all closed cases from all users could be potentially very large and require a significant amount of data to be transferred from our web server to your computer.

Exporting the Referral Tracking List

You may export the tracking list to an excel spread sheet by using the Export Cases button.



The spread sheet will contain two worksheets. The first worksheet contains your open cases list and the second your closed cases.

Click the Export Cases button, your spread sheet will be downloaded in your browser in the same way that you might download any file from the internet.

Viewing Case Details and Case Documents

To view further case details, documents and collect outcomes click the 'View' link on the relevant row in the case tracking screen. This will take you to the Case Detail View screen as shown below.

Make Referral | Track Referrals | Saved Referrals | Approval Queue | Request Questionnaire | Track Questionnaires | Management Information | User Admin

View case detail

Case Number: CSM/OM/MD/50 Date referral submitted: 29/11/2012 08:31:54
Employee Name: Mr Tom Baker Position: DJ
Address: Ash House DOB: 01/01/1985 00:00:00
 BN20 1NN
Owner: Simon Reynolds
 [Reassign Case](#)

Documents | Actions | Linked Cases

Document Type	Document Date	View Document
Advice Letter	20/12/2012 07:19:50	View Document
Referral Form	29/11/2012 08:31:05	View Document

The top section of the case detail view screen provides some details of the referred employee and the case.

The bottom section of the case view is split into four tabs: Documents, Actions and Notes and Linked Cases.

The Documents tab provides you with a list of case related documents. You may click the View Document link to the right of any document to download and view it (Note Adobe PDF reader required).

In the example above you can see the referral Form that you originally completed in the 'Make A Referral' section of the application. If available you may also see an 'Attached Document' – this may be the document that was attached at Step 6 on the referral form. As noted previously you can attach up to five documents to a referral – they will all appear here as 'Attached Document'.

When a case outcome or advice letter is available you will receive an automated email from the system advising you of this. You will find the advice letter relating to your case in the same documents section of the view case screen. Most often cases with outcomes will be closed cases. Advice letters appear listed as 'Advice Letter' in the documents list. Sometimes you may see an advice letter with the message 'Awaiting employee response' in place of the View Document link. This indicates that the employee has requested sight of the report first which is allowed under GMC guidelines. In this instance, once the employee has viewed the document and confirmed that there are no factual inaccuracies then the 'View Document' link will appear.

Delivering documents to you in this way provides a much more secure alternative to email and provides a convenient reference for you if you ever need to refer back to a case in the future.

The Actions tab provides you with a list of any medical appointments or other further medical evidence events and their status. In the case of appointments you can see the

date and time of the appointment and whether it is Open (pending), Closed (attended), Canx (cancelled) or DNA (employee did not attend).

Reassigning Cases to a new owner

If your organisation has chosen to allow you to reassign cases then you will see a link 'Reassign Case' in the Case Detail view. Please see the section relating to this later in this guide.

Managing Your Account and Sharing Your Cases

The My Account feature is available to all users (unless your organisation has asked us to remove this) this allows you to edit your profile details and allow other users in your group to have sight of your cases in the case tracking screens if you have initiated this. Select the My Account menu option from the blue navigation bar at the top of the screen.

Dashboard | CSM Demo | Simon Reynolds

My Account Logout

Make Referral | Track Referrals | Saved Referrals | Approval Queue | Request Questionnaire | Track Questionnaires | Management Information | User Admin

My Account Details

01 My Account Details 02 Shared Users

Title: Mr
First Name: Simon
Last Name: Reynolds
Company Name: CSM Demo
Address: HML Ash House, The Broyle, Ringmer
Postcode: BN8 5NN
Job Title: CSM
Telephone: 1212121
Email Address: Simon.reynolds@healthmanltd.com
Shared Services Request Code: NOT NORMALLY USED [Request Access]
Username: simon.reynolds

Please enter your current password to make any changes: []
Enter New Password: []
Confirm Password: []
[Save Details]

Password Rules

- ✗ At least one digit (0 to 9)
- ✗ At least one upper case letter (A to Z)
- ✗ At least one lower case letter (a to z)
- ✗ At least one symbol from ! # \$ @ _ + , ? [] -
- ✓ No more than 2 repeated consecutive characters
- ✗ Minimum of 10 characters
- ✓ Maximum of 100 characters
- ✓ No common words
- ✓ Must not include your username
- ✓ Passwords must match

This section is split into two tabs. On the first tab, My Details, you can edit the details that you registered with and you can change your password.

Note: you will not be able to change your User Name or email. Please contact your HML Account Manager if your email address has changed to discuss the best way to

facilitate this amendment. You will need to provide your current password in order to change your password.

Click the Save Details button to save your changes.

The second tab, Shared Users, allows you to share your ALL cases both referrals and questionnaires with another user.

First Name	Last Name	Username	Job Title	
Dale1	Anthony1	CSM1206	Staff	Unshare
Noz	Islam	inislam	CSM	Unshare

To share your tracked cases use the drop down box on the top right of the screen to choose another user in your organisation then click the Share Cases button. Shares will be listed in the table as above.

When you share cases with a colleague they will be able to track your cases and will also receive any automatic notification emails from the system in addition to yourself (the email function can be switched on or off so your colleagues just have visibility of the case rather than be copied into the associated emails) . If you wish to track their cases they then they must also share their cases with you.

The shared cases feature is useful if a colleague is taking a holiday or will be away from work for any amount of time.

If one of your colleagues is leaving your organisation it would be a good idea to get them to share their cases with an appropriate colleague so that their cases can continue to be tracked and notifications received. The Re-assign cases function can of course be utilised to move these cases to another user.

To stop sharing your tracked cases with another user simply select 'Unshare' next to their entry in the table.

Password Reset

If you forget your password then you may request a password reset by clicking on the Forgot Password link at the login screen.

Forgot password

[Back to login](#)

Please enter your email address, you will receive an email with instructions on how to reset your password

Email Address:

Once you click the link you will be prompted for the email address that you registered with.



Forgot password

Please enter your email address, you will receive an email with instructions on how to reset your password

Email Address:

Click submit. You will receive an email containing a link which you may use to reset your password.

An example of this email is shown on the following page. The email will come from online@healthmanltd.com.

A password reset was recently requested using your email address, to reset your password, please click the link below

[Click here to reset your password](#)

The above link will be valid for 24 hours after the request was initiated, after this time, you will have to re-request your password.

Follow the link in the email:

Forgot password

Please enter your email address and your new password

Email Address:

New password:

Repeat password:

Complete the form to reset your password and click Submit.

Forgot password

Thank you, your password has been reset, click [here](#) to login

Click the 'here' link to return to the login screen and login with your new password.

Username Reminder

If you have forgotten your username click on the Request Username link on the login page.

Request Username
[Back to login](#)

Enter the email address that you registered with and your username will be mailed to you.

Email Address:

At the next screen enter your registered email address to receive a reminder of your username by email

Online Referrals - Request Username

Enter the email address that you registered with and your username will be mailed to you.

Email Address

Once the email has been sent you will see the following confirmation.

Online Referrals - Request Username

Thank you. Your username has been sent to your registered email address.

Additional Permissions & Advanced Functions

Reassigning Cases

If your organisation has chosen to allow you the additional permission to reassign cases then you will see a link 'Reassign Case' in the Case Detail view. You might reassign a case if an employee moves from one department to another and their new manager wishes to have visibility of the case.

The new owner will be able to track the case and will receive all future correspondence concerning the case if the case is open.



View case detail

Case Number:	CSM/OM/MD/50	Date referral submitted:	29/11/2012 08:31:54
Employee Name:	Mr Tom Baker	Position:	DJ
Address:	Ash House BN20 1NN	DOB:	01/01/1985 00:00:00
Owner:	Simon Reynolds Reassign Case		

Documents	Actions	Linked Cases
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Document Type	Document Date	View Document
Advice Letter	20/12/2012 07:19:50	View Document
Referral Form	29/11/2012 08:31:05	View Document

To assign the case to a new owner in your organisation simply click the 'Reassign Case' link, you will be prompted to record a reason for the change.

Current Owner: Simon Reynolds

New Owner: Dale A'nthony

Reason for change:

Submit Cancel

You will also be able to reassign ALL cases from one user to another, for example if there is a change of line manager in an area or department. To facilitate this change you must have the additional permission of 'User Administration' in addition to 'Reassign Cases'

From User Administration > All Users you will see the list of registered users if you wish to reassign cases click on the 'Reassign cases' link to the right of user who you wish to remove the cases from

User Administration: All Users

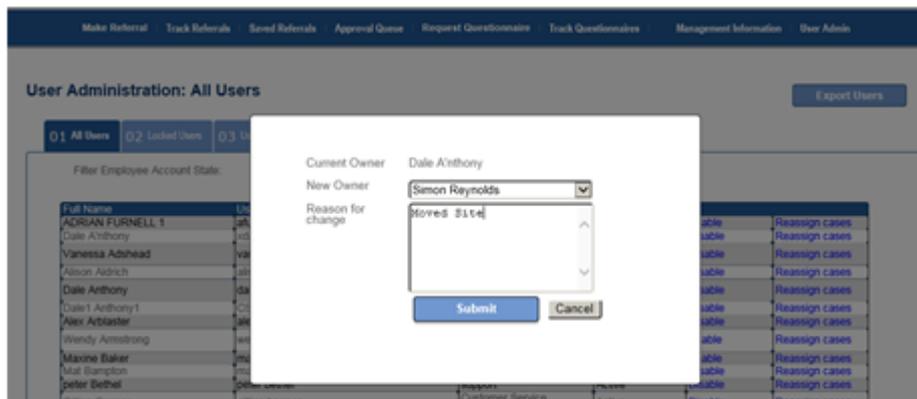
Export Users

01 All Users | 02 Locked Users | 03 User Shares

Filter Employee Account State: All

Full Name	Username	Job Title	Account State		
ADRIAN FURNELL 1	afurnell	Account Manager	Disabled	Enable	Reassign cases
Dale A'Anthony	xdale.anthony	CSM	Active	Disable	Reassign cases
Vanessa Adshead	vanessa.adshead	Customer Service Manager	Active	Disable	Reassign cases
Alison Aldrich	alison.aldrich	SDA	Active	Disable	Reassign cases
Dale Anthony	dale.anthony	Customer Services Manager	Active	Disable	Reassign cases
Dale1 Anthony1	CSM1206	Staff	Active	Disable	Reassign cases
Alex Arblaster	alex.arblaster@healthmanitd.com	XXX	Active	Disable	Reassign cases
Wendy Armstrong	wendy.armstrong	Customer Services Manager	Disabled	Enable	Reassign cases
Maxine Baker	maxine	Account Manager	Disabled	Enable	Reassign cases
Mat Bampton	mat.bampton	It Engineer	Active	Disable	Reassign cases
peter Bethel	peter.bethel	support	Active	Disable	Reassign cases
Gillian Bonner	gillian.bonner	Customer Service Manager	Active	Disable	Reassign cases
Brett Bylett	brettbylett	Database Administrator	Disabled	Enable	Reassign cases

You will need to select the new owner who is to receive the cases and your reason for this change, all cases open and closed will then be immediately moved to the new user.



User Administration

HML Online provides a way for a nominated person or persons to manage user accounts on behalf of your organisation. This enables you to act promptly to disable a user account should someone leave or change job role and also a way to unlock accounts where they have been locked out after 3 unsuccessful password attempts.

Additionally this section gives you visibility over sharing across your organisation and the facility to disable shares on behalf of a user.

Finally there is a special permission available which allows you to reassign case loads from one user to another. This may be appropriate for example when a manager moves into another role within the organisation and needs their replacement to have access to current and historical cases.

Manage User Accounts

Make Referral | Track Referrals | Saved Referrals | Approval Queue | Request Questionnaire | Track Questionnaires | Management Information | User Admin

User Administration: All Users

Export Users

01 All Users | 02 Locked Users | 03 User Shares

Filter Employee Account State:

Full Name	Username	Job Title	Account State		
ADRIAN FURNELL 1	afurnell	Account Manager	Disabled	Enable	Reassign cases
Dale Anthony	dale.anthony	CSM	Active	Disable	Reassign cases
Vanessa Adshead	vanessa.adshead	Customer Service Manager	Active	Disable	Reassign cases
Alison Aldrich	alison.aldrich	SDA	Active	Disable	Reassign cases
Dale Anthony	dale.anthony	Customer Services Manager	Active	Disable	Reassign cases
Dale1 Anthony1	CSM1206	Staff	Active	Disable	Reassign cases
Alex Arblaster	alex.arblaster@healthmanltd.com	XXX	Active	Disable	Reassign cases
Wendy Armstrong	wendy.armstrong	Customer Services Manager	Disabled	Enable	Reassign cases
Maxine Baker	maxine	Account Manager	Disabled	Enable	Reassign cases
Mat Bampton	mat.bampton	IT Engineer	Active	Disable	Reassign cases
peter Bethel	peter.bethel	support	Active	Disable	Reassign cases
Gillian Bonner	gillian.bonner	Customer Service Manager	Active	Disable	Reassign cases
Brett Bylett	brettbylett	Database Administrator	Disabled	Enable	Reassign cases

The first section of the User Administration menu allows you to view and report on current user accounts and to disable or re-enable them as necessary

Use the Export Users button to download an Excel spread sheet containing a summary of all users for your organisation, their current status and their last login date and time.

To disable any particular account click the Disable link on the right of the user list

To re-enable a previously disabled user account, click the Enable link.

If you have an additional special permission you are also able to reassign ownership of cases from one user to another using the Reassign Cases link as shown above.

Reassigning cases should be used with care as you are effectively changing who has permission to view case details and who will receive all subsequent communications in relation to the cases. It is designed to be used when a manager changes role and their replacement needs access to case histories and current cases. Reassigning cases at this level changes ownership and visibility of all cases belonging to one individual to another.

If you require this functionality please speak to your Health Management account manager.

Manage Locked Users

The second section of the user administration menu allows you to unlock accounts that have become locked out through three unsuccessful password attempts.

Please adhere to your own company policies whilst using this feature.

User Administration: Locked Users

Export Users

01 All Users | 02 Locked Users | 03 User Shares

Full Name	Username	Job Title	Account State	
Sue Carrington	Sue Carrington	Business Analyst	Locked	Unlock
Testeese Case	test.cases	Customer Services Manager	Locked	Unlock
Sandy Colwell	sandy.cowell	Team Leader	Locked	Unlock
devtest devtest	itdevtest21	fsf	Locked	Unlock
Sharon Dhariwal	Sharon.Dhariwal	CTA Team Leader	Locked	Unlock
Sharon Dhariwal	sharon dhariwal	CTTL	Locked	Unlock
Emma Dunning	edunning	CTA	Locked	Unlock
Gwyneth Dyal	GMDYALL	OHA	Locked	Unlock
Sharon George	Sharon George	C&I Consultant	Locked	Unlock
mark grainger	mark.grainger	Test	Locked	Unlock
Lynn Hall	lynnhall	CSM	Locked	Unlock
		Customer Service		Unlock

To unlock a user account simply click on the Unlock link

Manage User Shares

As described in the HML Online User Guide any user may choose to share a view of their cases with another user. This is typically used when a user goes on holiday or extended leave and wishes a colleague to keep an eye on their current occupational health cases. Sharing is one way, if a user shares with another user then the original user does not get to see the cases belonging to the person they shared with unless that person also shares with them.

Please speak to your account manager for further information on sharing.

If you have this special administrative role then you can see who has shared with whom and you can disable any share on behalf of a user as necessary.

User Administration: User Shares

Export Users

01 All Users | 02 Locked Users | 03 User Shares

Full Name	Username	Job Title	Account State	
Sarah Gamble	sarah.gamble	CSM	Active	View shares
Dale1 Anthony1	CSM1206	Staff	Active	Hide shares
Gillian Bonner	gillian.bonner	Customer Service Manager	Active	Remove Share
Christopher Jones	CJones1	CSM	Active	View shares
Emily Sinclair	xE.Sinclair	test	Active	Hide shares
Em xSinclair	xEmily Demo	test	Active	Remove Share
Kim Miller	kim.millar	Customer Service Manager	Active	View shares

Click the View Shares link next to any listed user to see who they are sharing with.

Click the Remove Share link to remove any individual share.

Security

- Remember that security is your personal responsibility.
- Be aware of your surroundings when you enter your account credentials.
- Never leave a logged in account unattended.
- Always take appropriate care handling documents that you download from the web site.
- Never share your user name or password. The Health Management service desk will never ask you for your password. You should challenge and deny any request for this type of information.
- An unattended session will automatically log out after 20 minutes of inactivity.