How to Add a Simple Company to Cohort

Version 2020-08-21 (KW)

Process Context

This process will add a company with a simple structure to Cohort. It does not deal with adding companies with multiple sites and/or separate HR teams that manage them. Providing instructions for adding such companies would require a long and detailed instruction manual. We don't have such a manual at the moment so adding companies with complex needs is best done by someone with a good understanding of the system.

Step-by-Step

In the following instructions, the large blue text indicates that you should click a left-hand menu item. Where this text is preceded with an ellipsis, it means you are already in the correct section of the menu and just need to click an item within that section.

Log-on to Cohort and click Admin
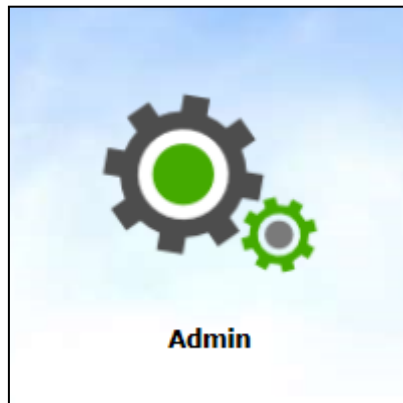
Adding the Company

➔ PORTAL | Admin | Employment | Associations | Directorates to Employer

- Search for the name (and variations of it) just in case it's already there.

Do NOT skip this stage. It is common that former clients return. Hundreds of former clients already existing within Cohort. If you find the company, speak to a member of the Senior Management Team. It may be appropriate to re-activate their existing record rather than create a new one.

➔ … | Reference Data | Employer

- ADD
- Type the name

- Fill in as many fields as possible in the CONTACT DETAILS section
- SAVE
- It will save you a lot of typing if you copy the company name now. You'll then be able to paste it into many of the following fields and search boxes

➜ … | Directorate

- ADD
- Type the same company name that you added in the previous step
- SAVE

➜ … | Associations | Directorates to Employer

- Select (paste) the Employer
- EDIT
- Find and move the Directorate you just created to the 'Selected' side
- SAVE

➜ … | Associations | Sites to Directorate

- Select the Directorate you just created
- EDIT
- Move 'Not Applicable' to the 'Selected' side
- SAVE

➜ System Admin | Business Areas | Business Areas

- Click ADD
- Description: **The Company Name | All**
  (*nb* note that **| All** appears at the end of their name)
- Click SAVE
- Click BUSINESS AREA PERMISSIONS
- Click ADD
- WATCH OUT! Business Area: Select the description used to create the Business Area in the previous step
- Company Name: Choose the Employer
- Leave the rest set to [ALL]
- Click SAVE
- If necessary (it rarely is), repeat if additional employers need to be added.
- Click PREVIEW
  - Check the hierarchy dropdown shows as expected; this will normally be:
    - Company Name: *(the company's name)*
    - Business Section: *(the company's name)*
    - Site: Not Applicable
    - Department: Not Applicable
    - Post Title: See attached Referral / Risk Assessment

➔ Appointments | Associations | Reason to Employer

- Select Employer
- Click EDIT
- Move all of the items over to 'Selected' *(using the right-facing button with a bar)*
- Move 'Unknown' back
- Click SAVE

➔ … | Resources to Employer

- Select Employer
- Click EDIT
- Move all of items over to 'Selected' *(as before)*
- Move back all people with an 'Admin' prefix
- Move back 'Unknown'
- SAVE

If They Will Be Submitting Management Referrals

Perform the steps in this section if the company will have at least one user who will submit Management Referrals.

➔ Management Referral Plus | Associations | Email Templates to Employer

- Select the Employer
- Click EDIT
- Select 'Management Referral (Email to Client on Update)' from the list
- Click SAVE

➔ … | Questionnaire Templates to Employer

- Select Employer
- Click EDIT
- Move '**0191 Management Referral Form**' over to 'Selected'

If we are to be undertaking Health Surveillance, Safety Criticals, urine, asbestos, IRR or blood tests:

- Select '**0294 Referral following Health Surveillance**' from the list

- Double check that you have the right forms. The list is messy because old forms cannot be removed or renamed. The numbers that prefix the form names are chosen such that newer forms have a lower number.
- Click SAVE

If Issuing Pre-Placement and Night Workers Questionnaires

Perform the steps in this section if the company will have at least one user who will issue Pre-Placement Questionnaires or Night Workers Questionnaires to their employees via the Portal

➔ **Document Management | Associations | Employment Plus Letter Template to Employers**

- Select Employer
- Click EDIT
- Move both Pre-Placement items over (including the one marked Do Not Use)
- Click SAVE

➔ **Employment Plus | Associations | Email Template to Employer**

- Select the Employer
- Click EDIT
- Choose 'Standard Template (PPQ/NW)'
- Click SAVE

➔ **… | Questionnaire Templates to Employer**

- Select the Employer
- Click EDIT
- Move 'OHC Pre-Placement Questionnaire' over to 'Selected'
- If they need to send Fitness to Teach forms, move 'At Offer Work Health Assessment (inc. Fitness to Teach)' over to 'Selected'
- If they need to send Night Workers Questionnaires, move that over
- Click SAVE

Statutory Medicals and Health Surveillance

Perform the steps in this section if our Technicians, OHNs and OHAs we will be assessing their staff, whether that is on site or at one of our own clinics

➔ **SHS | Associations | Questionnaire Templates to Employer**

- Choose the company from the list
- Click EDIT (bottom right)
- Move all of the Questionnaire Templates over
- SAVE

Adding Locations

Perform the steps in this section if we need to be able to select their site from the drop-down list of locations when making appointments (*e.g.* if we will be sending Technicians to their site)

➔ Appointments | Reference Data | Location

If they are to be a Health Surveillance client and so need their factory/office to be available in the dropdown when arranging clinics:

- Add
- Description: **Company Name – Nearest Town – PostCode**
- Colour: #45818e
- Add the company address, contact details etc.
- SAVE
- APPOINTMENTS | ASSOCIATIONS | Locations to Resources
- Appointment Resource
  - Select All
  - Deselect all beginning with "Admin – "
  - Deselect "Unknown"
  - EDIT
  - Move new Location over to the right (using the arrow)
  - SAVE

If Issuing HS Forms

Perform the steps in this section if the company will have at least one user who will issue Health Surveillance questionnaires to their employees via the Portal

➔ SHS Plus | Associations | Email Templates to Employer

- Choose the company from the list
- Click EDIT (bottom right)
- Choose 'Health Surveillance (Social Distancing) Email'
- Click SAVE

➔ … | Questionnaire Templates to Employer

- Choose the company from the list
- Click EDIT (bottom right)

- Tick whichever forms are needed – usually all those beginning LD/

Questionnaire Template
LD/003/01 HAVS Health Surveillance Questionnaire
LD/004/01 Respiratory Health Surveillance Questionnaire
LD/005/01 Audiometry Health Surveillance Questionnaire
LD/006/01 Skin Health Surveillance Questionnaire
LD/158/01 Safety Critical Medical Questionnaire

- Click the blue right facing arrow to move those forms to the right panel
- Click SAVE (bottom right)

Billing

Perform the steps in this section if we will be charging them for services that are not associated with an individual *e.g.* consumables, travel expenses, and accommodation fees.

➔ PORTAL | Cohort

- New Search
- ADD
- Title: Mr
- First Name: OHC
- Last Name: Fees
- Gender: Male
- DOB: 01/01/1900
- Company Name: *(choose the company)*
- Contact Name: Admin
- SAVE
- When prompted to match with an existing employee, choose: **Add New**

Adding Users

Perform the steps in this section if you have added access for Management Referrals and/or Pre-Placement Questionnaires and/or Health Surveillance questionnaires.

Deciding which usernames to create and how to configure them can be complex. Please speak with a SuperUser if you are unsure.

➔ T Drive | Cohort Software | Clients | !Info

- Open the TLA spreadsheet and create a UNIQUE three letter acronym for the employer (this should identify the client, a bit like an airport code). Please choose so that we can intuitively guess who the code belongs to *e.g.* ABC Logistics = ABC, Atticus Finch Scaffolding = AFS, Airport Furnishings = AIR, etc. Please avoid comedy or offensive choices

- Add the TLA to the spreadsheet and move to an empty cell. The TLA will turn red if it's been used before. When you have created a unique TLA, sort the sheet into alphabetical order and save the spreadsheet

➔ System Admin | Users

- Search for the username: OHC_TLA *(where TLA is <u>THEIR</u> TLA)*
- Assuming it doesn't show any records (if it does, you have a duplicate TLA):
  - Click ADD
  - Username: type in a username following the style shown in the following table:

Option	Username	Roles (see below)
1	OHC_TLA_Shared	- Employment Plus Delete - Employment Plus User - Employment Plus View Correspondence - Management Referral Plus User
2	OHC_TLA_Employment	- Employment Plus Delete - Employment Plus User - Employment Plus View Correspondence
	OHC_TLA_Referrals	Management Referral Plus User
	OHC_TLA_HS	- SHS Plus User - SHS Plus Delete
3	OHC_TLA_firstname.lastname	Management Referral Plus User
	Optional 'HR User' OHC_TLA_Oversight	Management Referral Plus User
	It may also be necessary to create a 'OHC_TLA_Referrals' user (as per Option 2) in situations where they want a team to submit the majority of referrals but one or more individuals will submit referrals that the team should not view.	

  - First Name: The First Name box is used as part of process [C018 HS & PPQ Report Sending](#). It's a code that tells the Admin Team which users are authorised to see which OHP reports:
    - You should type one <u>or more</u> of the following into the First Name box:
      - ! All >>   if they are authorised to see all OHP reports
      - ! Surv >>   if they can see reports following Health Surveillance
      - ! PPQ >>   if they are permitted to see reports following PPQs
      - ! Ref >>   if they are permitted to see reports following Referral

- z NONE >> if they shouldn't see any reports
  - You can use more than one as appropriate *e.g.* ! Surv & PPQ >>
  - Often these are related to the log-on *e.g.* Option 1 = All, OHC_TLA_HS = Surv. If you are unsure, please check with a SuperUser or the client

USER DETAILS

Username	OHC_Demo.Co.User
Title	Mr
First Name	! Surv >>
Last Name	OHC Demo Co
Active	Yes

- o Surname:
  - If Option 1 or 2, the name of the company.
  - If Option 3, the name of the individual preceded by [TLA] *e.g.* [DMO] Atticus Finch
- o Email: the address that is used to receive notifications that the response to a referral has been made. NOTE: Cohort does not allow us (on an account-by-account basis) to turn off the email notifications that are sent when appointments are linked to a Referral or a Response is created. If any user (for whatever reason) requires automatic notifications to be turned-off, add this email address: blackhole@my.ohc.ltd
- o Valid From Date: *(today's date)*
- o Password: *(any long password – but remember it for later)*
- o Save
- o ASSOCIATIONS | BUSINESS AREAS
- o Edit
- o Add the Business Area you created in the previous step
- o Click SAVE
- o Use the Breadcrumbs: USER DETAILS
- o ASSOCIATIONS | ROLES
- o Click EDIT
- o Add roles as per the Roles column in the above table
- o Click SAVE

Additional Steps for an HR User

- Click 'USERS' in top 'breadcrumb' bar
- Find your own Username
- ASSOCIATIONS | BUSINESS AREAS
- EDIT
- Add the Business Area from above
- SAVE

- Click Portal
- Click Management Referral Plus
- Click Users
- Find the HR User
- EDIT
- Tick HR User
- SAVE
- Optionally: remove the Business Area from your own username (to keep things tidy)

Test

- Log-out and log-in as the new user
- Paste the password you have already just used into the boxes when it asks you for a NEW PASSWORD
- Depending on the permissions set, you may be taken directly to the Management Referral Plus or Employment Plus dashboard screen.
- If necessary, go to Employment Plus
    - Click ADD
    - Check that the entire employment hierarchy (dropdowns) work
    - Check Questionnaire and Email Template dropdowns are correct (remembering schools should have both the Fitness to Teach and standard questionnaires)
    - Click CANCEL
- If necessary, go to Management Referral Plus
    - Do this quickly so that an auto-save of your test doesn't happen
        - Click ADD
        - In the EMPLOYMENT section, choose the Company Name (ONLY)
        - Check Questionnaire template(s) are correct
        - Check (if appropriate) that the HR User appears in the dropdown
        - Click CANCEL
- If necessary, go to SHS Plus
    - Click ADD
    - In the NEW EMPLOYEE DETAILS section, choose the Company Name (ONLY)
    - Check that the choice of Questionnaires and email templates is correct
    - Click CANCEL
- Log-out and log back in as yourself

If necessary, go back to the **Error! Reference source not found.** section (**Error! Reference source not found.**) and to add additional users.

Informing the Client

- Use the template T:\OHC information\Cohort Software\Clients\! Templates (Email)\Cohort Welcome

- Written instructions that explain to employers how to send SHS Plus forms can be found in this folder: T:\OHC information\Cohort Software\Clients\! Instructions\