

# Management Referral - Submitting a Referral using the Validation Process

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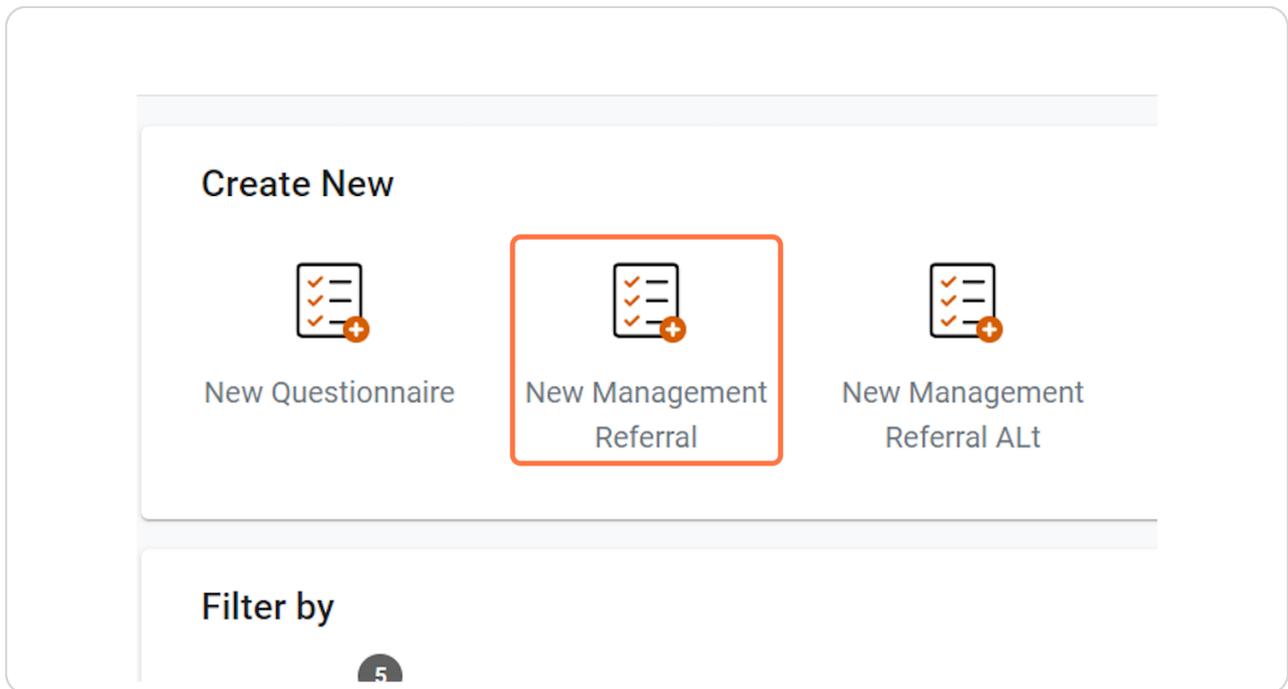
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October 30, 2023

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STEP 1

**On the MyCority Manager Home page, click on New Management Referral**

\*Referral Questionnaire names may differ, select the questionnaire advised by the Occupational Health Team



## STEP 2

### Enter the Employees First Name, Last Name and Date Of Birth

\*It is important this information is accurate as the Occupational Health team will need to use this information to match the referral to the correct Employee record. Failure to provide enough information may delay the processing of the referral.

6 / 50  
**Employee Last Name \***  
 5 / 50  
**Employee Date Of Birth \***  
   
DD/MM/YYYY  
**Manager**  
Bloggs (Cority), Joe (00888888)  
**Employer**  
   
**Business Area**

### STEP 3

## Complete all other relevant questions within the questionnaire

Mandatory fields are marked with a Red \*

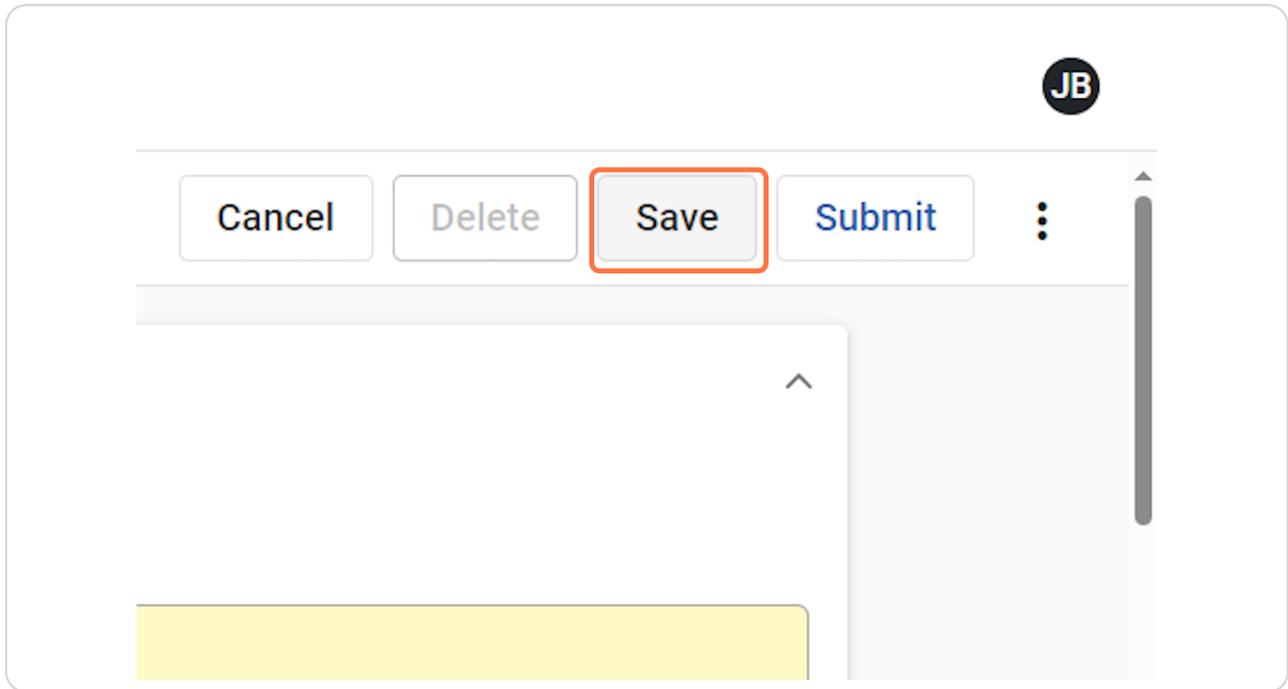
The screenshot shows a web application interface for a 'Management Referral' form. On the left is a navigation menu with 'My Tasks' selected. The main content area has a title bar with 'Management Referral' and buttons for 'Cancel', 'Delete', 'Save', and 'Submit'. The form fields are as follows:

- Employee Date Of Birth \***: A date input field containing '01/01/1970' with a calendar icon on the right. Below the field is the placeholder text 'DD/MM/YYYY'.
- Manager**: A text field containing 'Bloggs (Cority), Joe (00888888)'.
- Employer**: A search input field with the placeholder 'Search for...' and a dropdown menu icon on the right, which is highlighted with a red box.
- Business Area**: A search input field with the placeholder 'Search for...' and a dropdown menu icon on the right.
- Division**: A search input field with the placeholder 'Search for...' and a dropdown menu icon on the right.
- Department**: A search input field with the placeholder 'Search for...' and a dropdown menu icon on the right.
- Location**: A search input field with the placeholder 'Search for...' and a dropdown menu icon on the right.

#### STEP 4

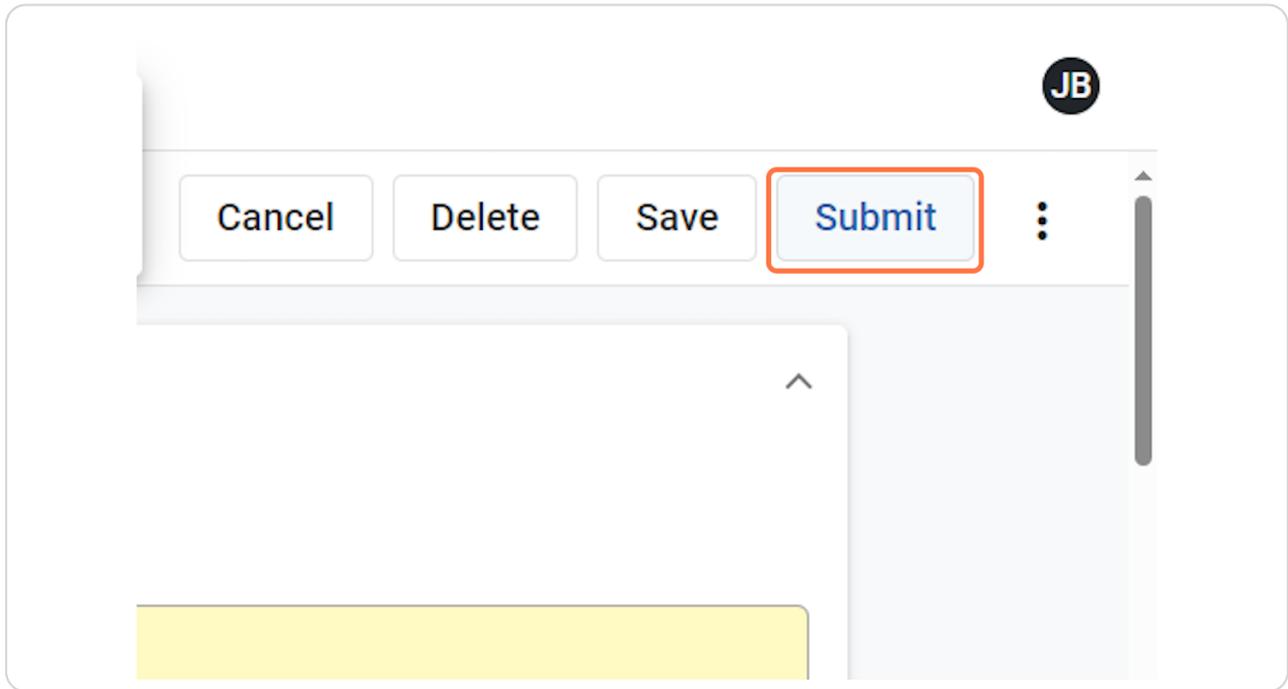
**You can save the referral at any point by selecting "Save" at the top of the screen**

Saving will only save the details added, it will NOT be visible to Occupational Health until it has been submitted.



STEP 5

Click on Submit once the detail in the referral is complete and ready to send to Occupational Health



*Tango*

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