

Apollo

Occupational Health Digital Portal Guide

EMPLOYER



Symbios Health Limited

T: 0800 999 1824

E: hello@symbios.health

W: www.symbios.health

Registered in England. Company No : 13065822

Registered Office: Plym House, 3 Longbridge Road, Marsh Mills, Plymouth, PL6 8LT



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(Employer) How to add an employee on to the system:

- 1) Click on the employee's icon in the side bar
- 2) Click the 'add employee' box
- 3) Enter employee details (all fields with an asterisk must be completed) and once all fields are complete – the 'next' button will appear to go on to the next section
- 4) Enter the employee's contact details, you will need either their email address or phone number before you can continue
- 5) Complete employment details. Note: The occupation field is a drop down and you can change this to a text field and enter a custom title by clicking on the blue circle to the side of the text box.
- 6) Complete all fields, click next
- 7) On the final page there will be a 'Save and add employee' button. Click this and a pop up will display confirming that the employee has been added to the system.
- 8) The employee will then receive an email from Apollo to log in and register to the system.

{Employer} How to reset an employee's password:

- 1) Please make sure all of the employees details have been inputting correctly, this might be why they are locked out of the account.
- 2) Contact us at adhoc@symbios.health and with the employee's name and DOB and we will be able to reset the account for you.
- 3) The employee will receive an email with a link to restart the account.

{Employer} How to resend the employee dashboard link:

- 1) Make sure the employee's email address is correct so they receive emails from Apollo, they will not be able to access the account if they don't receive emails.

The link they will need to log in is: <https://symbios.apollo.direct/employee>

(Employer) How to make a referral:

- 1) Click on the employee's icon in the side bar
- 2) Click on the 'search' box
- 3) Type the employees name into the search bar
- 4) Click on the employee that you would like to refer
- 5) The employees' profile will be displayed. Click on the action menu on the top right-hand side
- 6) Click on new action/case in drop down box

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- 7) Click on to management referral to begin creating a referral for this employee
- 8) Enter details as requested (consultation type and reason for referral)
- 9) Enter any supporting information
- 10) Tick box that applies; report can be post to (permissions etc)
- 11) Refer employee

(Employer) How to add a sub client:

- 1) Click on the sub client icon in the side bar
- 2) Click on the new sub client tab on the top bar
- 3) Enter the sub client details: **Symbios Health Ltd**
- 4) In the location section, add any location or department that the client operates from (these locations may be assigned to employees when they are created for this client) For example Plymouth base, Exeter base, Manchester base etc
- 5) Once completed, click create client
- 6) A pop up will display acknowledging the creation of a new sub client. Hoorah! Click close to dismiss this pop up.
- 7) To add employees to this sub client you need to first change our location to the client you want to add the employee to
- 8) To do this click the change client icon in the side bar
- 9) This allows us to change the client and subsequently access the information related to that client such as the employees, reports, and other information
- 10) It also allows us to take actions for that client such a adding a new employee
- 11) From the drop down we select the new sub client we just created
- 12) And then all company locations from the next drop down
- 13) Click submit to continue
- 14) Now our location has changed to the new sub client – we can add a new employee to it
- 15) To do this click the employee’s icon in the side bar then click on the add employee button
- 16) Enter the employee details the Save/ add employee to sub client successfully

(Employer) How to send a questionnaire to your employee:

- 1) Click on the employee icon in the side bar
- 2) Click on the search button
- 3) Enter the employees name into the search bar
- 4) Click on the employee in the results
- 5) From the employee profile page, click on the action menu in the top right-hand side

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- Click on the new employee assessment option in the drop-down box
- Select which questionnaire you want to send by clicking on the check box
- For example, the standard employment assessment
- Then choose the employment release option from the drop-down box (this means who will see the report when it is released)
- Click send employment assessment button to send the questionnaire
- A pop up will confirm it has been sent

(Employer) How to view a report:

- 1) Click on to the employee's icon in the side bar
- 2) Click the reports button
- 3) From here, you can expand each category by expanding each category heading
- 4) To view a report, click on detail of the report you want to a view
- 5) These can also be printed by clicking on the print icon in the top right-hand corner

(Employer) How to upload files to the employees file manager:

The file manager is an easily accessible yet a safe and encrypted space to store files.

We first need to go to the employee's profile page.

- 1) Click on the employee's icon in the side bar
- 2) Click on the search button
- 3) Enter the employees' details into the search bar to locate the employee
- 4) Click on to the employee and it will take you to the employee's profile page
- 5) Click the action menu button in the top right-hand side
- 6) Click on file manager from the drop-down list
- 7) From the file manager pop up, you can click on upload files by clicking on the upload files button
- 8) You can either drag your file in to the box
- 9) Or click upload file that will bring up the file explorer where you can navigate to the file you want to upload and either double click or click open
- 10) A 'green done' button and a yellow message will display and indicate it has been uploaded successfully
- 11) The file will now appear in the file manager.

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(Employer) How to set up and use google authenticator:

Due to the nature of the work involved; you will be required to log in through a secure process to access Apollo. You can access using the google authenticator instead of your registered email address and you can set this up using the instructions below. You will need to log in with a new code each day.

- 1) Click the user icon on the top right-hand side on the home page
- 2) Click on the user settings option from the drop-down box
- 3) This will open the user profile page and from here the two-factor authenticator method can be changed
- 4) Expanding the security section will display the current method
- 5) To change the method, click the edit button
- 6) To change to google authenticator, select it from the drop-down box
- 7) This will have to be downloaded to your phone
- 8) For an iPhone – go to the app store or for android, the play store
- 9) Search for google authenticator and install
- 10) After installed, open app and scan QR code on apollo web page
- 11) Once scanned a row will be added in authenticator app that contains an automatically refreshing code which will be used when logging in
- 12) Click save changes to save this method
- 13) From the log in page, click the google authenticator option
- 14) Enter your email address and password as normal, click proceed
- 15) Check the google authenticator app for the 6-digit code and enter it to log in and submit

(Employer) How to set gender pronouns:

- 1) To set your user information
- 2) Click on the profile image in the top right-hand corner
- 3) From the drop-down menu, click user settings
- 4) This will take you to your profile page
- 5) To edit your personal information, click the edit' information next to the personal details section
- 6) If you wish to use a custom title, click the icon to the right of the box (this will change the drop down to a text field where you can type in your title)
- 7) Use the pronouns drop down to select/change your pronouns
- 8) You can enter your chosen name in the chosen name text box
- 9) To save your changes, click save user settings button

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