

Management reports on OPAS

Guide: Accessing & Downloading a Management Referral Report in OPAS

This guide outlines how Referring Managers can access and download a Management Referral Outcome Report within OPAS. Once a report has been released, it becomes available directly within the case record, allowing you to quickly view and save a copy for your records.

Following the steps below will ensure you can locate the report efficiently and store it securely, in line with best practice.

Step by Step Guide:


1 Open the Case



Case ID	Employee	Status
CAS-00123	Alex Green	Open
CAS-00124	Sam Brown	Open >
CAS-00125	Jordan Smith	Closed


Open the relevant case once the report has been released.

2 Go to Communications



Navigate to the "Communications" section.

3 Create New Communication



Select "New email, letter, text or online document."

4 Locate Outcome Report




Locate "Management Referral - Outcome Report."

5 Click Download



Click "Download."

6 Save as PDF



Save the report as a PDF to your local system or employee file.

Important Notes:

- Reports are only visible once released to management.
- Always **download** and store reports locally, as OPAS does not act as a document storage system.