

Occupational Health Referral

Guidance Notes for Managers

In order for Occupational Health to provide an effective and efficient service, it is important to provide complete and appropriate information when referring an employee. Referrals which are incomplete, or contain inappropriate or irrelevant information, will be returned and this will cause delay in receiving the service you require.

The following guidance is to assist you when making an Occupational Health referral.

Data Protection and Confidentiality:

All referrals and the information they contain are treated under the legislation governing medical confidentiality and data protection. Before submitting an Occupational Health referral you must advise the individual that you are referring them to Occupational Health, the reason for the referral, the information you are providing to Occupational Health and the questions that you would like Occupational Health to answer (you must sign the form to confirm that this discussion has taken place). If possible, and practical to do so, you should give the individual sight of the completed referral form. You should therefore be mindful of how you complete the referral, using only factual and objective terms. Anecdotal information, hearsay and speculation should be avoided, as should the details of any third parties.

The Occupational Health Referral Form:

It is crucial that all the relevant sections of the referral form are completed correctly and fully in order that Occupational Health have all the required information to provide you with relevant, useful advice.

please ensure you include your contact details and the date that you completed the referral form.

- personal details, such as name, date of birth, up-to-date contact details, are vital so that there are no errors with staff receiving appointment

Description are required so that the Occupational Health Practitioner can fully understand what is expected of the employee in the workplace. It is very difficult to give advice on functional ability if the role is not understood. It is important that you ask the employee how they would prefer to be contacted by Occupational Health and indicate this on the form.

rral please select the reason you are referring the individual to

-
term absence please indicate whether the issue is being managed through the informal or formal stages of the relevant University Sickness Absence Procedure. In some cases the individual may not be off work or have had previous periods of

sickness absence but a referral may be needed due to concerns around the
result of a health issue or their well-being.

please include as much relevant information here as possible.
The type of information you provide here should include

Length and reason for current absence.

Where an individual has been referred to Occupational Health because of concerns around high levels of short-term sickness absence you may want to ask Occupational Health to advise whether the individual is able to maintain regular attendance (they will advise whether the individual is suffering from an underlying health condition, any treatment they are receiving, and the prognosis of any diagnosed medical condition).

With all referrals you may mendations,
for example, if there is an underlying medical condition causing the absence(s),
these adjustments will be needed for or whether they will be required indefinitely),
if a phased return to work is required and if so what this will look like. Also, whether

In both short-term and long-term sickness absence cases you may wish to know whether the Equality Act is likely to apply (i.e. whether the individual is likely to be regarded as having a disability as defined by the Act), and if the absence is due to an accident or injury at work and whether Occupational Health plan to review the individual again.

As well as the standard areas of questioning the referral details box allows you to state any case-specific questions that you would like Occupational Health to respond to. Your HR Advisor can advise on this.

Review Appointments:

Once a management referral has been initiated Occupational Health will assess the member of staff and then determine whether a review appointment is needed and will advise you of this in the report. In these cases you do not need to complete a further referral form but it may be useful for you to provide a brief update to Occupational Health prior to the review appointment if there have been any significant changes since the last appointment or if there are new, specific questions that you would like Occupational Health to advise on.

Documentation Required:

Please ensure you provide the following information with the referral form –

- It may be relevant for Occupational Health to be aware of any sensitive issues that may be pertinent in order for the appointment to be beneficial. For example if the employee has personal, mobility or transport difficulties, raising awareness of this would be helpful before an appointment is issued.

Sending the Referral:

Once completed the referral should be emailed, posted or hand delivered under confidential cover to Occupational Health.

o