

MANAGEMENT REFERRAL - A MANAGER'S GUIDE

Line managers may decide to refer an employee to Occupational Health (OH) if their performance or attendance at work is possibly affected by a medical condition or if it is suspected that work is a factor in causing ill health.

When to refer:

- Managers should seek advice from OH for all sickness absence longer, or expected to be longer, than four weeks.
- In cases of disability there may be a requirement to make reasonable adjustments to an employee's work to enable them to work effectively.
- When the employee or their GP has indicated an absence due to stress related ill health

Other reasons for referral include:

- Short frequent absences
- An employee has an accident
- An employee notifies you about a change in their health.
- A report is required regarding an employee's fitness to attend a meeting with their manager.
- The employee has had a DSE assessment and they have declared they have a medical condition which requires an Occupational Health Assessment

This guidance will provide you with advice on how to refer an employee to occupational health and on important steps in the process:

- Discuss the referral with your HR Advisor. (Informal advice can be sought from Occupational health.)
- Discuss the referral with the individual ensuring that they understand the purpose of the referral: It is important that you discuss the referral form with the employee you are referring as they may have additional information they wish to add. If the employee is absent then contact them by telephone and ensure they have a copy of the referral.

- When completing the referral form ensure that you complete all sections of the referral and provide as much detail as possible. Please note the following:
- In section 1 we need full contact details including the employee's preferred email and telephone number.
- In section 2 please provide the background information and details as to why the referral was triggered.

Include the following:

- Details about previous or current absences.
- Details of any factors that could be contributing to the member of staff's absence.
- Details of any workplace factors that could be contributing to the member of staff's absence.
- Detail of any workplace adjustments that have been made to support the employee.
- Details of any disciplinary issues or actions being taken.

In section 4 the focus is on the information you as the manager would like to know in order to manage the employee effectively. Whilst there are set questions please feel free to include additional questions.

Occupational Health Actions.

On receiving the referral Occupational Health will contact the employee. A telephone call will be attempted and if no response an email will be sent or a letter if no email address is available.

An appointment will be offered with the Occupational Health Advisor within 48 hours of receipt of the referral.

The aim is to offer an appointment in the next 5-10 days.

What happens during an appointment?

The employee will be seen by the OH Advisor (OHA) who will go over the reason for the referral. An assessment will be undertaken including discussing details of the employees' health and work and may involve a physical examination.

The OH advisor may carry out a functional assessment and it may be felt that further information about the individual's health is required from their GP or Specialist.

What happens after the appointment?

Once the assessment has been completed, the OHA will write a report. They will discuss with the employee what they intend to say.

Members of the OH team are bound by a professional code of conduct and confidential medical details will not be passed on. The employee will be asked to give consent for the manager and HR to receive the report.

The employee can request to see this report prior to it being sent to their manager and HR.

The Occupational Health Advisor will send the report to the employee within 5 working days of the appointment. The employee is asked to contact OH and give their consent for the report to be released to their manager.

If the report has any factual errors the employee can request for these to be corrected prior to it being released.

What happens if the employee refuses for the report to be released?

The Occupational Health Advisor will contact the employee and discuss the reasons why the employee has refused to release the report. A discussion will be held with the employee that without Occupational Health advice the manager has no option but to act on the information they have and this may not help the employee.

As a manager do you have to comply with the advice?

It is important to remember that Occupational Health can only give advice to you as a manager and Human Resources.

As the employees manager you must make the decision on whether the advice is implemented, particularly in relation to determining reasonable job adjustments.

Please note that all recommendations contained in the report are recommendations only and it is the responsibility of the manager to decide what is and what not a reasonable adjustment is.

What happens next?

You should arrange to discuss the report and any recommendations made with the employee. You are required to do what is reasonable but may not always be able to put the recommendations into practice.

Once you have the report and please contact OH if you to discuss any aspects of it.

Will a review appointment be made with occupational Health?

Routine reviews are not usually warranted and a review appointment will not be arranged unless it is felt necessary by the occupational health advisor.

If an employee is considered unfit to return to work a review may be indicated.

If the employee continues to have problems then managers are requested to re refer the employee to occupational health and a new referral form should be completed.

If you have any questions in relation to making a referral please do not hesitate to contact the OH team.

Occupational Health

Telephone 01183788635/01183788654

