

Guidance: Making a referral to Occupational Health (Revised November 2018)

A management referral can be made whenever an occupational health opinion would be helpful. There are a variety of circumstances, where it is recommended a management referral should be made without delay.

- Continuous long-term absence from work due to ill health. As soon as a manager is notified of an employee who is going to be on long-term absence (4 weeks or more).
- Frequent short-term absences from work, to check if there is an underlying cause and where no improvement in attendance is sustained.
- Concern about an employee's capability to carry out the full duties of their post due to health reasons.
- Advice on making reasonable adjustments to the work place/duties, to enable an employee with a disability/medical condition to carry out their duties or continue at work in a reduced capacity, including when an employee develops a new disability or where an existing one worsens.
- Concern over an employee's performance at work due to a medical condition.
- Advice on a phased return to work following ill health absence.
- Advice on medical redeployment due to ill health.
- Advice/assessment for Ill Health Retirement.
- Notification of work related stress, accidents at work or musculoskeletal problems.
- Where an employee has taken excessive signs of mental health, alcohol or drugs related issues.
- Any serious or terminal illness, for example, heart attack, stroke or cancer.
- To assess whether an employee is well enough to attend a meeting, for example, a disciplinary interview or hearing.
- To access a second opinion from a specialist, private consultant or in cases where dismissal is being considered.
- Concerns for an employee's wellbeing, whether off sick or at work, for example, change in work performance, behaviour, time keeping.
- To satisfy legal requirements

A manager should refer any member of staff who has been on continuous sickness absence for four weeks, an employee with continuous short-term absences or any employee complaining of workplace stress.

The purpose of a management referral to the Occupational Health Unit may be to

- Identify and address personal, organisational and work related causes of sickness absences
- Promote health, safety and employee welfare within the workplace
- Deal with a 'potential' absence problem at an early stage to prevent it from becoming a more serious long-term issue
- Support employees who are in the process of recovering from illness or improving their level of attendance to ensure a sustained recovery and attendance at work

Prior to referring an employee to the Occupational Health Unit, where possible, the manager should meet with the employee to discuss the issues of concern and reasons the referral is being made. If it is not possible to meet in person then telephone or written contact should be made.

Assistance with the referral procedure can be obtained by contacting the Occupational Health Unit direct (**020 8825 7400**) or from the relevant HR Adviser.

Contact numbers and addresses for both the employee and manager must be clear, up to date and completed fully. Providing an email address for correspondence will reduce the time scales in receiving a response.

It is important

- For the employee to have a copy of the referral, to ensure they are fully informed as to the reasons they have been referred and to open lines of communication between the manager and employee about the issues of concern.
- Where relevant, sickness absence details are included. This must include dates and reasons for absence.
- **To provide as much detail as possible about issues that are of most concern and what, in particular, you would like Occupational Health to address. This helps to avoid unhelpful responses to the manager.**
- Keep in regular contact with the employee during periods of sickness absence to see how they are and establish the timescale for return to work
- To provide regular feedback, in particular, prior to review appointments, to update Occupational Health on the current status so that we are fully in the picture prior to seeing the employee. **Without this feedback we have only the information provided by the employee to take into account.**

Managers should note that all correspondence regarding an employee, made to the Occupational Health Unit, would be filed on the employee's medical record which, by law, can be accessed by them, following written application for disclosure of their records.

It is possible for the Manager/ Headteacher to speak to the Occupational Health Adviser at length, in person or by telephone to discuss the referral in detail and receive advice about appropriate information to include.

You may contact the Occupational Health Unit at any stage of the referral process for advice.

- To establish if a referral is appropriate/useful.
- To see how a referral is progressing.
- You wish to discuss further, some advice that has been given.

Please remember to mark the envelope or email as 'Confidential', to ensure employee confidentiality.