



Management Referrals

Occupational Health Referral form

The employer will fill in the referral form with:

- Reason for referral:
 - e.g. ongoing back issues, impacting on attendance at work.
- Questions for Occupational Health:
 - Up to three to be chosen from a list of questions (with option to free text)
 - e.g. Is the employee fit for the role, are there any adjustments required to improve the employee's attendance.
- Relevant workplace information:
 - Details about the employee's role
 - Adjustments implemented to date
 - What can not be changed in the role
 - Employer concerns etc

Referral questions

Up to three questions can be asked as part of the referral. You may wish to utilise the below questions as part of your referral:

- Is the employee fit for their normal hours and duties required by their post? If not, when will they be able to return to work/return to normal hours/duties or alternative work?
- What if any work adjustments may facilitate a return to the substantive role?
- If the substantive role cannot be adjusted sufficiently what temporary alternative duties is the employee fit to undertake safely?
- Is there an underlying medical condition affecting their ability to work?
- Has the employee accessed appropriate treatment/support to support their health, wellbeing and attendance?
- Is there any additional help or treatment recommended to support the employee?
- What lifestyle adjustments if any are recommended for the employee to support their ongoing health, wellbeing and work attendance?
- Is the employee fit for work in any capacity? If not when is the employee likely to be fit to return to work?
- Is this employee likely to be able to provide regular and effective service in the future?
- If the employee is unlikely to return to their substantive post for health reasons but can work
 - in an alternative role is permanent redeployment recommended?
- If the employee is unlikely to return to their substantive post for health reasons is the employee a candidate for ill health retirement application?
- In your view, is the employee likely to be covered under the disability provision of the Equality Act 2010? Occupational health can provide guidance only on this question.
- Is the employee fit to attend a formal meeting (i.e. disciplinary)?
- Other – maximum two extra questions permitted. Please provide detail below. Any additional questions will be chargeable.

Occupational Health Assessment. What happens in an assessment

If the employee consents to the assessment, the clinician will assess the employee's medical history as part of the assessment.

Occupational Health Report

The Occupational Health report will have the following sections

- **Introduction:** This will include the information from the school given in the referral. The employees consent will also be stated clearly.
- **Background:** This may include a brief history of relevant medical conditions eg history of ongoing back issues/anxiety depression
- **Current condition**
- **Fitness for work and Recommendations**
- **Referral Questions** and answers
- **Occupational Health review** if indicated

Current condition, Fitness for work and recommendations

The clinician's medical opinion lies predominantly within this section of the report. The information here will be specific to the employee and this referral. To form their opinion, they will consider:

- Sickness Absences
- Medical treatment including consultations with GP and specialists, medication, investigations and follow up plans
- Referrals, assessment or treatment from physiotherapists, mental health professionals or any other therapists
- The effect of treatment and whether medical advice appears to be in line with symptoms
- Whether the employee has engaged with treatment or taken proactive steps to improve their symptoms
- Impact on daily activities and general function
- Social activities
- The employee's function in relation to the job description to evaluate their fitness for work
- Work details such as hours, workplace tasks and other job design details
- Whether any adjustments or restrictions may support the employee to work safely in the workplace
- Has the employee reported any concerns or injuries in the workplace

The clinician will then give their opinion on the employee's fitness for work and any adjustments which may support the employee to work safely along with any relevant timescales.

Adjustments such as a phased return to work, amended hours, amended duties, restricted duties or redeployment may be considered.

Referral questions

To avoid repetition, and to keep the advice in the report clear for the employer, up to three specific referral questions can be answered at the end of the report. It is important to remember, that the Occupational Health report is advisory, and the employer is responsible for implementing any advice (eg adjustments, or risk management) within the report in line with their own policies and procedures.

An opinion as to whether the Equality Act 2010 applies to an employee is given in answer to the referral question only.

Occupational Health Review

A review or follow up appointment is not usually required, but if the clinician feels it is clinically indicated they will state this in the report with the timescale.