

Guidance for managers making an Occupational Health referral

Making a Referral

When making a referral to Occupational Health (OH), as well as answering the mandatory sections and ticking the appropriate boxes relating to the employee's specific medical concerns, for appropriate OH advice, additional questions will need to be added to each referral under the '**additional questions section.**' This is to ensure we have an audit trail of the questions asked, and that we can gain appropriate consent from the employee to ask our questions during consultation. This also allows us to receive the most appropriate medical advice and recommendations from the referral as possible.

It is also helpful to attach relevant documents to the referral, with the full consent of the employee, such as medical letters, GP fit notes, copy of the employee's job description etc.

Short Term Absence(s)

When referring an employee to Occupational Health (OH) it is particularly important that you, with the input from the employee (where possible), consider what is needed from the referral. Short Term Absences may be related to an underlying medical condition, and / or disabilities, or may also be an early sign of a workplace concern or something going on in the employee's personal life.

Example Questions for Short Term Absence(s):

- Are the employee's absences short term and sporadic?
- What is the nature of the absence(s)?
- Is there a noticeable pattern in absences?
- Are there an underlying condition(s) to consider that may impact the length and frequency of absences?
- What treatment (if any) is the employee currently receiving for the condition(s)? In your opinion, given the medical history, how effective is the current treatment likely to be?
- Do the absences relate to a disability, which may be covered by the Equality Act (2010)?
- Is the employee's condition(s) likely to continue to impact the employee's attendance (or performance, where appropriate) at work.
- Are the absences work related? If so, ask that OH explore this with the employee.
- Could there be something going on in the employee's home life that is driving recurrent short-term absences from work? If so, what, if anything, can the University do to support?
- In your opinion, is employee fit to continue working in their current role? Please provide details of what (if any) aspects of the role the employee is not fit to continue with, or which duties require adjustments (please attach job description).
- Are there any adjustments that the University could consider putting in place to support the employee's attendance at work, either temporarily or permanently?

This list is not exhaustive and if there are questions relevant for your employee, please include these as part of the referral.

Long Term Absence(s)

When referring an employee to Occupational Health (OH) it is particularly important that you, with the input from the employee (where possible), consider what is needed from the referral. Long term absences may be related to underlying conditions and / or disabilities, or they could be a one-off recovery from an injury or accident. Whatever the reason, we need to be specific in our questions to get the most appropriate advice from OH.

Where it is stated, or suspected, that an employee may have work related concerns, it is imperative that an OH referral is done at the earliest opportunity. It is understood that early

intervention into work related issues is much more likely to be resolved, and therefore avoiding the employee becoming absent from work, or returning to work earlier during a period of absence, if the concerns can be addressed in the initial stages, or where interventions are put in place early.

Example Questions for Long Term Absence:

- What is the nature of the employee's long-term absence?
- Is this absence a one off, or recurring nature?
- How long is the employee likely to remain off work?
- Is the absence(s) related to a disability that is likely to be covered by the Equality Act (2010)?
- What treatment (if any) is the employee currently receiving for the condition(s)? In your opinion, given the medical history, how effective is the current treatment likely to be?
- Are there underlying condition(s) to consider that may impact the length and frequency of absences going forward?
- Is this condition or any other condition likely to affect the employee's future attendance at work?
- In your opinion, is employee fit to continue working in their current role? Please provide details of what (if any) aspects of the role the employee is not fit to continue with, or which duties require adjustments (please attach job description).
- Is the absence work related? If so, ask that OH explore the reasons for this with the employee
- Are there any adjustments that the University could consider putting in place to support the employee's return and future attendance at work, either temporarily or permanently?

This list is not exhaustive and if there are questions relevant for your employee, please include these as part of the referral.

Non-Absence Related Referrals

There are occasions when an employee has not been absent from work, however, their health is impacting them at work, and we may need to refer to OH to gain their medical advice on where we can support the employee in the workplace. This could be a physical health concern where reasonable adjustments such as a specific chair, mouse, desk etc., can be recommended, or a condition such as dyslexia where the employee would benefit from specialist equipment to support their working lives. Please note that we do not need to wait until there are absences or other work-related concerns, before seeking guidance from OH.

Example Questions for Non-Absence Related Referrals:

- What, if any recommendations can be made to support the employee in carrying out their role
- Would any specific equipment be recommended to support the employee in carrying out their role?
- Does the condition relate to a disability, which may be covered by the Equality Act (2010)?
- What treatment (if any) is the employee currently receiving for the condition(s)? In your opinion, given the medical history, how effective is the current treatment likely to be?
- In your opinion, is employee fit to continue working in their current role? Please provide details of what (if any) aspects of the role the employee is not fit to continue with, or which duties require adjustments (by reference to the job description).

This list is not exhaustive and if there are questions relevant for your employee, please include these as part of the referral.

Covid Related Referrals

As we are a campus-based university with a student body that will expect face to face teaching and an on-campus student experience, we need to be specific about the questions that we ask in our OH referrals. The University appreciates that there will be case-by-case concerns, however, our guidance is that we do not think that working from home is a reasonable adjustment. Therefore, we need to ensure that we have advice that helps us get people back to campus-based working. **Please ensure** that you note on the referral that working from home is not an adjustment the University can accommodate.

Example questions:

- What is the context of the employee's anxiety or condition?
- Have they sought medical advice previously and if so, what was this?
- Where else are they going on a daily / weekly basis, and how do they manage that?
- What measures could the University consider supporting the employee's return to campus?

This list is not exhaustive and if there are questions relevant for your employee, please include these as part of the referral.