

**GUIDANCE FOR MANAGERS: OCCUPATIONAL HEALTH**

**OCCUPATIONAL HEALTH REFERRALS**

Occupational health provide a range of services for the prevention of work related injury or ill health. They can also assist in supporting staff with chronic conditions and facilitate an early and sustained return for those who are absent from work.

You may wish to refer an employee to the Occupational Health Service if you have a concern about their wellbeing whilst they are at work or if they are absent from work due to a period of absence.

As a manager you should carry out an initial assessment of the situation and decide if a referral to Occupational Health is necessary.

Employees are required to attend any appointment made for them with Occupational Health. Failure to attend without reasonable explanation may result in the withholding of sick pay.

In certain situations, an immediate referral may be necessary. These include:

* Stress/perceived work related stress
* Work related injury/accident at work
* Absence following maternity leave
* Mental Health related absence
* Long Term Absence-where the absence is expected to last 6 weeks or more
* Short Term Absence-following Stage 2 where there has been no improvement

*Note: This list is not exhaustive. You should discuss specific cases with your HR Business Partner if you have a concern regarding a member of staff.*

**Completing a Referral**

* As a manager you should complete the Occupational Health Referral Form and return this to your HR Business Partner. The template form can be accessed here (Insert Hyperlink). A list of the HR Business Partners is contained here. (Insert Link to HR Contacts)
* Ensure that you have included all of the relevant information as to why you are making the referral and any support that you have provided to the employee to date.
* Consider the questions that you wish to ask the Occupational Health professional. It is important that you ensure you ask the appropriate questions as Occupational Health will only answer the questions asked. Sample questions are contained in Appendix A. If you are in any doubt, you should consult your HR Business Partner.
* Ensure that you complete all of the relevant sections on the form as failure to complete will result in the form being returned by Occupational Health.
* You must inform the individual that you are making a referral and provide them with a copy of the final referral form **in advance** of the appointment.
* Upon receipt of the final referral, your HR Business Partner will request the appointment for the member of staff.

**Appointment**

* Occupational Health will triage the referral in advance of the individual attending to determine which medical professional the assessment should be undertaken by. The consultation may be undertaken by a Doctor or a Nurse dependant on the reason for referral.
* The employee will attend the appointment at Occupational Health with the relevant medical professional at 5 Lennoxvale, Belfast, BT9 5BY.
* The appointment will usually last between 45 minutes to one hour. During the appointment, the relevant practitioner will undertake the consultation based on the referral provided.
* At the consultation, the employee will be provided with the option of viewing the report before it is issued to management. If the employee requests a copy of the report, they will have 5 working days to consider the report from the date of the report. Following the 5 working days, the report will then be released to management.
* The report will usually recommend one of the following;
  + **Fit for work (No review planned)**
  + **Fit for Work with Adjustments**
  + **Unfit for Work (review planned)**
  + **Permanently Unfit for Work**

**Upon receipt of the Report**

* When you receive the report, you should consider the recommendations and any implications for your area and how this may be managed in practice.
* Occupational Health may recommend a phased return to work as an adjustment. A phased return is a mechanism whereby an employee returns to work following absence gradually to allow the employee a period of rehabilitation into the workplace. Further guidance can be found here. (Insert hyperlink)
* You should arrange a meeting with the employee to discuss the report. If the employee is absent from work, you should meet with the member of staff **in advance** of the employee returning to work. A template letter to inviting an employee to a meeting is contained here (Insert Hyperlink)
* You should ensure that any adjustments to working pattern, hours or alternative duties, are discussed, agreed and confirmed in writing.

**Appendix A: Occupational Health Questions**

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| Is the employee fit for work? |
| Is the employee currently unable to be at work due to ill-health or some other reason? Please specify |
| Is the individual likely to return to work in the foreseeable future? Please specify when the employee will be fit for work. |
| Does employee have an underlying medical condition? |
| Has the medical condition lasted, or is it expected to last, for 12 months or longer? |
| To what extent does the medical condition have a substantial and long term adverse effect on the employee’s ability to carry out normal day-to-day activities and which would impact on their ability to provide regular and reliable service? |
| Does employee require any workplace adjustments (and if so for how long) which you think should be considered to assist with return to work and/or to maintain a regular and reliable attendance at work? |
| Is there any action the employee can take to assist in their recovery? |
| Is this person a potential candidate for ill health retirement? |
| Is the employee fit to attend a meeting/hearing regarding their employment? |
| Does the employee require any reasonable adjustments to attend this meeting? Ie. Off site meeting, conference call etc. |

**Additional Questions**

* What is the likely date of return to work?
* What is the likelihood of a recurrence of the problem?
* Will this employee be able to provide regular and effective service in the future?
* Are there any underlying medical problems likely to impact on ability to provide regular and effective attendance at work?

**NOTE: This list is not exhaustive and should be tailored to the individuals circumstances.**