

## Tips on Completing OH Referral Form

### Employee Details

Address: Please use employee's home address and not their work address. Please double check with the staff member that their postal address is correct. They may have moved and not updated their records. Some staff who are off long-term may move in with a relative/friend for additional support.

Mobile Number: If you include this number, the staff member can be sent a text reminder 24 hours ahead of their appointment.

### Nature of the problem that has initiated the request

Issues and information that managers need to consider or cover when filling in why the referral has been initiated section of the referral form:

- What is the issue?
- When did this issue start?
- Is this issue regular? If so, when does the time span to and from?
- Is the employee currently absent from work as a result of this? If not currently, have they ever been absent as a result of this in the past?
- What are the environmental factors? e.g. indoors/outdoors, hot/cold, light/dark, work station
- Has the employee sought support personally through GP/specialist etc.?
  - If so, has there been a diagnosis relating to this specific condition/ issue?
  - If so, what it is? What are recommendations for this diagnosis?
- Are you aware of any other underlying health conditions possibly impacting on or causing this condition/issue?
- In what way does this condition/issue affect their ability to do their role?
- Does this condition/issue affect others in the workplace?
  - If so, in what way does it affect others?
  - Have HC already put any supporting measures in place?
- If so, what are they? Has there been any improvement since?
- Has the employee made any suggestions/requests for improvements?

## **Specific advice required**

Questions that managers wish Occupational Health to answer or consider, based on medical information:

- Whether or not the employee has a health problem which has an impact upon their fitness to carry out their duties. Where the medical adviser is unable to identify any medical problem to account for an employee's absence record then this will be clearly stated.
- The likely duration of any period of absence or, if it is not possible to be precise about this, the minimum period for which they are likely to be absent.
- When they do become fit to return to work, whether they will be fit to return to their full duties or whether restrictions will apply, and what these restrictions may be e.g. hours of duties, temporary or permanent.
- What steps could be taken to assist with an individual's return to work, e.g. a period of part time work.
- If an individual will not be fit for their normal duties, please describe the nature of other types of duties which they might be fit for to allow managers to consider opportunities for redeployment.
- The likelihood of ongoing episodes of sickness absence, whether such episodes may be of long or short duration.
- Whether the employee's health problem may, in any way, be related to their duties and any suggestions as to how further problems may be prevented
- Recommendations for a further review of the employee.
- Any additional information required from the manager either to assist the medical adviser in making a recommendation or prior to a subsequent review and whether the medical adviser feels that a meeting with the referring manager may be helpful.
- Whether any independent specialist assessment may be helpful and the likely cost.
- Whether a case is reportable under RIDDOR or may qualify as a disability under the disability provisions of the Equality Act (formerly DDA)
- In addition, any other specific questions asked by the referring manager will be addressed.

Refer to absence management policy for further guidance and/or your HR Officer.

Date: September 2018