

## How To - Occupational Health Referral

The Occupational Health Service (OH) is provided by specially qualified Occupational Health (OH) Nurses and Physicians. Their role is to guide and advise managers about the effects of work on health and health on work. A manager's role is to decide upon a reasonable course of action in the circumstances, taking the OH advice into account.

### When to use the OHS for managing employee health and wellbeing issues:

- For advice on an employee's medical condition or disability and the effect of this upon ability to attend work (an employee does not need to be absent for a referral to be made).
- For early advice on work related stress/depression/anxiety or a musculoskeletal disorder.
- In cases of long term sickness: the likely length of absence; return to work date; return to work advice, including phased return; likely ongoing sickness absence levels; (ill health retirement, if the teacher wishes OH to complete the Med1 form).
- For frequent absences: whether there is an underlying health condition; whether absence levels can be supported by medical evidence; reasonable adjustments including a transfer to a suitable alternative post on medical grounds.
- Confirming Fit Note advice.
- Non-attendance at formal meetings/Hearings due to illness (e.g. Disciplinary Procedure for Teachers, Grievance). Whether the employee is sufficiently well to attend formal meetings/Hearings.
- Termination of employment: OH advice must always be obtained before a Health Capability Dismissal takes place.

### When there is not a need to refer to OH

When information is already available from the employee and OH advice will not add value to the management of the situation (except for termination of employment and Health Capability Transfer, see above).

### How to make a referral to the Occupational Health Service

Key activities for managers to undertake when referring an employee to the OHS are:

- Check that OHS advice is required: it may be that all information is already known in order to decide on a course of action.

- v' Ensure a meeting (e.g. Supporting Health and Wellbeing Discussion; Supporting Health and Wellbeing Meeting/ Review/Hearing) has taken place with the employee so that they understand the reasons for the referral. Explain this is a means of support to the employee as well as support and advice for the Council. Explain that the employee will be asked to give consent under the Access to Medical Reports Act (1988) in the event that information is requested from their GP or specialist.  
Give the employee [Notes for employees](#) referred to Occupational Health for a medical examination.
- v' If necessary, advise the employee that they are expected to attend any appointments and co-operate fully. Failure to attend an Occupational Health assessment without providing, where possible, in advance of the appointment a satisfactory explanation e.g. incapacity due to medication or hospitalisation may result in the suspension of sick pay.
- v' Complete the [OH Referral](#) providing sufficient background information about the reason for the referral, the employee's job and any action, reasonable adjustments considered or already taken. By providing relevant information, more relevant and specific answers will be received from the OHS. Details of the sickness absences including the number of absences and occasions will be required (My View or the Employment & Payroll Team). Suggested questions are below:
1. Does the employee have an underlying health condition that prevents them from carrying out the duties of their job role?
  2. How does the employee's underlying health condition manifest itself in the job role or workplace?
  3. Is the health condition caused or made worse by their work activity? If yes, provide an explanation.
  4. When is the employee likely to be fit for a return to work?
  5. Are there any reasonable adjustments/modifications that the Council could consider to expedite and/or facilitate a return to work, and for what period would they be likely to apply?
  6. Is the health condition likely to affect future attendance at work? If yes, what level of sickness absence is likely?
  7. Should any action/adjustments be taken to manage side effects resulting from medication?
  8. How long will the health condition last and what is the prognosis/ongoing effect upon their job role?
  9. Could the condition fall under the definition of a disability within the Equality Act?

10. Could the condition of the employee impact on the health and safety of others? If so, what action should be taken to manage this?
11. As a result of a health condition is the employee permanently incapable of the duties of their current job role?
12. Is health capability transfer a reasonable adjustment to consider? If yes, what type of job activity could the employee reasonably be expected to undertake?
13. Does the employee meet the criterion for Ill Health Retirement within the pension schemes?

v' Advise the employee of the content of the referral.

v' An appointment will be arranged by the OHS. The employee and manager will receive details of the appointment directly from the OHS.

If an employee refuses or fails to attend any OH appointment(s), this should be discussed with them to clarify the reasons for refusal. If the employee persists in refusing to attend, they should be advised by their manager that decisions regarding their employment will be made based only on facts/advice already available.

**Action taken once report received from the OHS Service:**

v' Following an Occupational Health assessment, the manager should arrange to reconvene the meeting, without undue delay, with the employee to discuss the Occupational Health report.

v' The Occupational Health report provides advice to the manager who is obliged to consider the advice and act accordingly on the basis of a reasonable course of action.

v' Where the report indicates that the employee's condition could be considered a disability particular care must be taken when deciding whether or not to follow the recommendations, see the [Disability and Reasonable Adjustments Guidance](#). Additional advice may also be sought from the HR Services Team.