

# OCCUPATIONAL HEALTH MANAGEMENT REFERRAL

## Please undertake the OH Referral module available in the People and Organisational Development online training library before completing this referral form.

**It may be necessary to discuss this referral with your HR Adviser prior to forwarding to the employee.**

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| **NAME OF EMPLOYEE:** | **DATE OF REFERRAL:** |

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| **PERSONAL DETAILS** | |
| **Date of Birth:** | |
| **Home Address:** | **Tel number:** |
| **Mobile number:**  *OH can send a SMS text alert the day prior to your appointment; would you wish to receive this?*  *Please indicate* **Yes** ☐ **No** ☐ |
| **Previous name (If appropriate)** | **Preferred E mail:**  **Preferred method of contact – please tick one or more:**  **LBU number** ☐ **Mobile** ☐ **Email – work** ☐ **/ personal** ☐ |

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| **DETAILS OF POST** | |
| **Job title:** | **School/Service:** |
| **Working location:** | **Usual hours of work:** |
|  | **Working Pattern: (days )(shifts** Yes ☐ No ☐) |

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| **Is the employee currently absent from work?** | Yes ☐ No ☐ |
| **Does the employee have a current fit note?** | Yes ☐ No ☐ |
| **What is the reason given for this absence?** |  |

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| **DETAILS OF ABSENCE (or attach a larger report)** | | | |
| **Dates From:** | **Dates To:** | **Length of Absence**  **(Days):** | **Nature of Illness:** |
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| **BACKGROUND and REASON FOR REFERRAL (including what support is already in place):**  ***(If a re- referral, please outline and review adjustments and support already put in place)***  ***If appropriate, please complete/consider the following before a referral is submitted:***   1. ***Individual stress risk assessment*** 2. ***DSE assessment*** |
| **Can Occupational Health please advise on the following issues?** (Tick all appropriate boxes)   * 1. Is the employee currently fit for work? * 2. What is the likely timescale for recovery and/or when do you anticipate a return to work? * 3. Are any job adjustments, auxiliary aids, or supportive services appropriate and for how long? * 4. Is the medical problem likely to be caused by or made worse by work activity? * 5. Is the health condition likely to recur or affect future attendance/job performance? * 6. Is the employee likely to meet criteria for ill-health retirement? * 7. Other – please be specific. a)   b) |
| **ROLE AND RESPONSIBILITIES:** |
| **Brief outline of specific duties:** |



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| **Job Description attached** Yes ☐ No ☐ **Task Analysis attached (if appropriate)** Yes ☐ No ☐ (Are there any physical tasks that an individual undertakes as part of their role) |

## I confirm that I have:

* Discussed the reason for this referral with the employee and provided the employee with a copy. Date sent to employee Method: E mail / post / by hand

**Occupational Health Referrals should be sent directly to** [**occupationalhealth@leedsbeckett.ac.uk**](mailto:occupationalhealth@leedsbeckett.ac.uk) **and copied to your HR Adviser**

**Failure of the employee to attend without good reason may result in the School or Service area being charged £100**

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| **Manager making this referral:** |
| **Position:** |
| **The report will be shared with School/Service area’s HR Adviser: (name)** |

**Further information**

Data is processed in accordance with the General Data Protection Regulations (May 2018). Information obtained by Occupational Health during this referrals process is used for the purpose of occupational medicine and the assessment of the employee’s working capacity for the purposes as detailed above. This information will form part of the employees Occupational Health record and will be stored on a password protected secure database for a period of 7 years after the termination of the employee’s employment at the university. The information obtained by Occupational Health during this referral process is confidential to the Occupational Health Service and will not be released to a third party without the employee’s consent.

Occupational Health reports will be sent to the employee via the email address specified or their work email if one is not provided. The employee is entitled to review the contents of the report before it is sent; in such cases unless Occupational Health are informed of mitigating circumstances, standard practice is for the employee to respond back within 2 working days. If a response is not received within 7 calendar days, then it will be assumed that the employee does not agree to the report being shared and we will inform the employee’s manager, who will then base their decisions on the information available to them.

With the agreed consent, Occupational Health are responsible for sending a copy of the report to the referring Line Manager and advised HR Contact only (typically the HR Adviser). On occasion and outside the jurisdiction of the Occupational Health Service, it may be necessary for the employee’s report to be then further shared/discussed with other appropriate Managers and HR professionals, this would be on a strictly ‘need to know basis’. If the employee has any concerns around who may have access to their report, this should be discussed with their referring Manager.

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**Guidance on Making an Occupational Health Referral**

Do you need advice from Occupational Health? – Do you have concerns that a health problem is affecting a colleague’s work performance or attendance, or are the effects of work impacting on an individual’s health condition?

* Is the absence likely to be for 30 days or more – make a referral as soon as possible.
* From the first day of absence and with their consent, colleagues who are absent from work due to stress (personal or work related) or anxiety, can be referred to our Employee Assistance Programme- Spectrum.
* To access the referral form and more information about referring a colleague for support, including counselling, see the [Wellbeing for Managers](https://www.leedsbeckett.ac.uk/peopledevelopment/wellbeing/wellbeing-for-managers/) pages.
* If the colleague is suffering from work related stress, an Individual Stress Risk Assessment should be completed before a colleague is referred. Please refer to the [Managing Stress](https://www.leedsbeckett.ac.uk/staffsite/services/human-resources/working-here/wellbeing-and-occupational-health/managing-stress/) webpage.
* Is the absence due to a muscular skeletal condition? – contact [Occupational Health,](https://www.leedsbeckett.ac.uk/staffsite/services/human-resources/working-here/wellbeing-and-occupational-health/occupational-health/) as an early referral for physiotherapy may be appropriate (only if within 24-48 hours of the occurrence/injury).
* Have the reasons for the referral been discussed with the colleague concerned? A reminder of the appointment will be sent by SMS if the individual agrees to this (please indicate this on the referral form).
* The referral should be made in consultation with your HR Adviser. Please provide them with a copy of the referral for retention on the individual’s personal electronic file.

# What to include in a referral

When completing the referral, consider what specific advice you would like. The written report provided by Occupational Health will be in response to the questions asked in the referral. You may wish to include:

* The colleague’s current circumstances.
* Details of any adjustments, restrictions or support measures that have already been implemented and provide an opinion on the effectiveness of these measures.
* Include factual details on the medical condition and how this is impacting on attendance and the work/performance of the colleague.
* Include a description of the key responsibilities of the job and any relevant information about how the work is carried out in practice, and any impact on the team.
* The more specific your questions are the more useful the report will be for you.

Occupational Health may suggest adjustments or make recommendations, but it is for management to decide on their [reasonableness,](https://www.leedsbeckett.ac.uk/staffsite/-/media/files/staff-site/human-resources/working-here/sickness-absence/nn_the_equality_act_2010_consideration__of_reasonable__adjustments.pdf?la=en) not all have to be implemented. Advice will be provided in relation to matters of employment and fitness to work.

# Advice may include:

* Whether there is an underlying medical condition that impacts on work activity or attendance.
* The potential effects of a health problem on current and future work attendance and performance.
* Adjustments to the workplace or tasks that managers might consider to accommodate colleagues with health problems – are they of a temporary or permanent nature?
* The potential for health improvement and estimated timescales.
* Is there any other relevant information or advice you feel will help us assist the return to work?
* What, if any, medical treatment, or support is the colleague currently receiving for the condition(s)
* Are there any perceived restrictions/barriers to returning to work?

On receipt of the report, a further meeting with your colleague should be arranged to talk through the advice provided and to discuss an acceptable way forward, including any recommendations and further review dates.

**Occupational Health Service**

**Appointment information**

## What is Occupational Health?

The Occupational Health Service at Leeds Beckett University offers professional, confidential, and objective advice to colleagues and managers about health, safety, and well-being. In particular:

* Exploring the effects of work on health and health on work.
* Providing recommendations for improving physical and psychological wellbeing within the workplace.
* Identifying and preventing illness and injury that can arise from work activity.
* Providing advice on workplace adjustments, specialist equipment and disability.
* Providing advice on health issues affecting attendance, and rehabilitation following sickness absence.
* Signposting and referring to other agencies, including physiotherapy.

## Who are we?

**Ann Coulson**, Occupational Health Manager (RGN, SCPHN)

**Deborah Caspi**, Occupational Health Advisor (RGN, SCPHN)

**Janet Norfolk**, HR Support Team Assistant (OH support), Monday to Wednesday

**Dr Asim Suleman**, Occupational Health Physician (MBChB MRCGP MRCP MSc DOccMed)

(sessional, 2-3 clinics a month)

All of our clinical staff hold up to date registration with their relevant professional bodies (Nursing and Midwifery Council and General Medical Council), have specialist qualifications in Occupational Health and significant post registration experience.

In addition to undertaking Occupational Health assessments, Dr Suleman holds responsibility for the clinical assessment of WYP Ill Health Retirement applications.

## Confidentiality, and storage and handling of data

The Occupational Health Service maintains confidentiality and remains impartial in advice regarding health issues in the workplace. This creates an environment where colleagues feel they can raise sensitive matters, and managers can receive appropriate advice on issues related to fitness for work.

Personal data is processed in accordance with the General Data Protection Regulations (May 2018). Information obtained during the occupational health appointment is used for the purpose of occupational medicine and the assessment of working capacity. The personal information is confidential to the Occupational Health Service and will not be released to a third party without individual consent. All occupational health files are stored on a password protected secure database, or in the case of hard copy records including health surveillance, in locked filing cabinets in a locked room within Occupational Health. All records are stored for 7 years following termination of employment at the university, with the exception of health surveillance records as part of COSHH, which are stored for 40 years.

## FAQs

## How do I access the service?

Consultations with an Occupational Health Practitioner are offered on an appointment basis, via referral from your Line Manager. We are unable to accept self-referrals to the service.

## What can I expect after I am referred?

In most circumstances you will be contacted within 48 hours of receipt of the referral and offered an appointment with an Occupational Health Practitioner. Once a convenient appointment has been arranged, your Line Manager and HR Contact will be informed. All Occupational Health colleagues are hybrid working with most appointments being offered by telephone or virtual platforms. Where it is deemed clinically appropriate an in-person appointment will be arranged.

The reason for your referral will be discussed during the appointment. The consultation offers you an opportunity to provide information in confidence about your health and circumstances, to ensure that you are accessing appropriate support. The appointment will take a maximum of 45 minutes.

## What sort of advice will be given?

Following your appointment, the Occupational Health Practitioner will send a report to your Line Manager and HR contact, the proposed content of which will be discussed with you during the consultation and your consent sought. You may wish to review the contents of the report before it is sent, or you may consent for the report to be forwarded to those concerned (including yourself) all at the same time. The report is usually completed within 48 hours of the appointment, and on occasions where this is not possible, you will be advised of this in advance. Reports are usually sent via email, as a password protected PDF, to your Leeds Beckett University account.

Depending on the nature of the referral, advice on the following may be offered:

* Whether you have a health or wellbeing issue which may affect your attendance or performance at work.
* An estimate of the time you may need for appointments or for treatment.
* If you are absent, how long is it likely to be before you are ready to return to work.
* If you have been seriously unwell, recommendations to your manager on measures that might assist you to return to work while you are fully recovering and in rehabilitation.
* If you are not fit to return to your current job, recommendations on alternative duties or adjustments.

## What if I disagree with the contents of the report?

The advice given by the Occupational Health Practitioners is impartial and is their considered opinion. If you do not agree with the advice, contact the Occupational Health Practitioner with your concerns in the first instance.

You may withhold your consent for the report to be shared with your Line Manager and HR Contact at any time. In this situation, your Line Manager will assess and manage your case based on the information available to them and without that contained in the report.

## Will my manager have to comply with the advice?

The role of Occupational Health is to offer advice and make recommendations regarding your individual situation. It is your Line Manager’s responsibility to decide whether the recommendations are reasonable, taking into consideration the needs and resources of the individual department. Occupational Health do not provide, or order, any equipment that they may recommend. It your Line Manager’s responsibility to authorise and order this.

## Why can’t my GP, another doctor or therapist carry out the assessment?

Occupational Health Practitioners are qualified to explore how health can affect work activity, and how work activity can impact upon health, and are more familiar with your work and workplace. On occasion, and with your consent, Occupational Health may seek supporting information from your GP or treating health professional to assist with their assessment.

## What if I am unable to attend the appointment?

As there is a high demand for appointments, please make every effort to attend on the date and time given.

If you are unwell or unable to attend for any reason, please contact Occupational Health as soon as possible to rearrange the appointment on 0113 8123185 or [occupationalhealth@leedsbeckett.ac.uk](mailto:occupationalhealth@leedsbeckett.ac.uk).

Your Line Manager and HR Contact will be advised that you have been unable to attend.