

How to make a good referral

1. Making a referral

This guidance covers steps to help line managers make a referral using the occupational health portal. Getting the correct information ready beforehand can help to progress a case and minimise any future delays due to missing information.

2. What do I need to consider beforehand?

Referring an employee into occupational health should only be done if the issue itself can't be addressed with effective management support in your organisation. Referring an employee before you've tried this can lead to medicalising an issue that doesn't require that type of intervention. Using the supportive resources provided, managers can deal with straightforward cases themselves.

Ensure you've checked any relevant company policies in your organisation, and if necessary, consult with your HR department for guidance on making a referral.

3. What should I prepare before making a referral?

Before you make a referral, it's important that you have clear reasons for why a person is being referred. We recommend following the steps below to ensure you have covered everything needed to make a successful referral.

- **Make sure you clearly communicate what the referral is about and that you have the employee's verbal consent.** Discuss the referral with the employee and make sure they fully understand the reasons why they are being referred. Make sure they are aware of what is being written as part of the referral, and what questions are being asked – as this information will be read out to the employee as part of the referral. Ensure you obtain verbal consent to make the referral, and check the employee is happy to attend any appointments or answer calls related to the service. This will help to make sure that the employee is engaged throughout the process, and it supports the best possible outcome from the referral.
- **Have a clear idea of what you as a manager want to get out of the referral.** For example, this may include advice on making adjustments, signposting or support putting together a return-to-work plan.

- **Make sure you understand what you will get from the final report:**

The final report will be broken down into sections:

- Current health issues: In this section you will see the comments that have come through from the employee.
 - Current capacity for work: This is the part of the report where the practitioner will give their advice and opinion on an employee's fitness for work. It will also include any necessary adjustments that they may need, and advice on any risk assessments that may need to take place.
 - Outlook: In this section, the practitioner will give their advice on what the long-term view is going to be. For example, it may include details around whether the employee will get better, or whether the issue is something that is likely to be a recurring problem.
 - Disability advice: The practitioner will advise on whether the employee is likely or not to fall under any legislation. This may also include advice on recommended adjustments or restrictions.
 - Add/select additional questions: The final section of the report covers up to three additional questions that managers can submit. For example, it may include questions such as whether there is a safety critical issue or whether the employee is able to attend a management meeting.
- **Ensure you have the correct up-to-date employee details.** This includes things like the employee's full name, date of birth, contact number and home postcode.
 - **Obtain information about any measures already put in place.** This will need to be included in the referral. For example, it could cover any adjustments already made to the employee's shift patterns or tasks.
 - **If required, prepare some additional questions (the amount of additional questions you can ask, will be clear on the Portal/OH System).** This is an opportunity to clarify anything that is not already covered in the generic report. For example, depending on job role, it may include clarification on whether an employee can drive or work at heights.
 - **Be mindful that information should be accurate, and not submitted based on speculation.** Keep the information provided factual.

Remember, the management report from occupational health can offer advice, but it's for the employer to decide whether adjustments can be made. Occupational health can offer their recommendations, but the business will need to decide whether they can implement the recommendations made, and if so, for how long.