



Guidance for Line Managers when Referring Employees for Occupational Health Review

The information included within the management referral form is of paramount importance to the Occupational Health team when establishing and understanding the reason for referral and required advice.

To gain the most from any Occupational Health appointment a high level of detail regarding job role, specific concerns and absence details needs to be captured.

Below are some key requirements of a referral that are often missed, which can result in misunderstandings by the employee, employer or OH professional.

- Always discuss the content of the referral with the employee. This allows the employee to be fully prepared for their appointment and understand fully the concerns the employer may have.
- Always discuss who specifically has made the referral and who the OH report is going to be sent to when completed. The process of informed consent will be discussed between the employee and the OH professional on the day of the appointment, however if expectations are discussed in advance this will prevent any delay in getting the report back to the referrer.
- The use of personal sensitive information is regulated in law by the General Data Protection Regulations (GDPR) and covered by the ethical requirements of the General Medical Council & Nursing and Midwifery Council, a copy of our [Privacy Notice](#) and how we handle personal sensitive information is available on request.
- Occasionally it may be relevant to have a discussion with the OH professional prior to the appointment with the employee. This discussion can provide some useful detail around work environment, job role or other details which are not always captured on the referral form. It is helpful to advise the administration team at the time of the referral if this is required so that the OH professional can allow time within their schedule to contact the referrer.
- Occasionally the employee may ask to see the report prior to it being released to the employer. This is a reasonable request but can delay the return of the report to the employer by a day or two.
- Occasionally further information from treating Doctors may be required. In this instance consent to proceed will be sought from the referrer as there may be further cost implications.
- If the employee reviews the OH report prior to its release they have the right to request that any factually incorrect statements are changed, which the OH professional is obliged to do. If the employee has issue with the professional opinion documented, the OH professional will not necessarily change this but would be happy to discuss this further with the employee.
- The Gipping OH clinical team would be happy to offer further advice on the completion of the referral forms should you require additional guidance.