

An Employee Guide to Occupational Health Management Referrals

What is Occupational Health (OH)?

Occupational Health (OH) is a specialist branch of healthcare concerned with the effects of work upon health and health on work. The clinician is a registered nurse (NMC) or doctor (GMC) with specialist qualifications in occupational health.

Many employers require independent occupational health advice when they have concerns about health issues in the workplace that maybe affecting performance, safety and or attendance. Or the employee has requested on occupational health assessment.

The aims of occupational health are to support you and the business make informed decisions about the management of health & wellbeing at work.

The benefit to you in attending an OH assessment is to give you an opportunity to discuss and receive advice about any medical conditions, ill health symptoms, impairments, medication, work and health concerns with a registered health professional who has a specialist qualification in occupational health. It is usually beneficial to you for your line manager to receive professional health advice about work related health impairments and adjustments that would assist you to work.

The responsibility for the diagnosis and treatment of your ill health remains with your GP and/or Specialists.

Referral to occupational health

Usually human resources or your line manager will complete the occupational health referral form.

The form content and need to refer to occupational health should have been discussed with you. From this discussion your express consent to the release of the referral form and to the occupational health assessment will be obtained by the referring person. This will be checked at the occupational health assessment.

Preparation for your Assessment

Assessment can either be face to face, video or telephone.

If it is a telephone or video assessment you must be somewhere suitable to take a private and confidential phone call. An assessment cannot be conducted if you are driving. The assessment will not go ahead if the clinician has reason to believe you are not somewhere suitable to take the telephone call. The employer will be informed and full charge applied.

Please remind yourself of your history of ill health and treatments.

Please have the following available with you at the assessment –

- Any medication or a list of medication that you have been taking.



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- Copies of relevant letters from hospital specialists if available. If possible sending these to anna@whib.co.uk prior to the assessment would be useful.
- Any information that you think may be relevant to your assessment
- Be able to access the [NHS app \(England\)](#) [My Care Northern Ireland](#) or [NHS Wales app](#). Scotland are developing their own and it is not yet available.

If you have a telephone/video appointment, please be ready to take the call from the OH Clinician on the agreed number/email address.

The clinician will make at least 3 attempts to call. The call may be from a withheld or free phone number. The clinician will wait a minimum of 10 minutes on video. After this the appointment would be considered as a did not arrive and a full charge will be passed to your employer.

If you are more than 10 minutes late, it is at the clinician's discretion as to the assessment going ahead or not. If the appointment does not go ahead the employer will be informed and charged the full rate.

Use of AI type transcription, note taking or recording systems will not be allowed unless with prior agreement. This is due to risk of confidentiality breaches.

Your Appointment Health Assessment

During the introduction the clinician will explain confidentiality & consent, read the main parts of the management referral form to you and explain their role.

The clinician will ask you questions in relation to your work, health, functional abilities, limitations, medical treatment and lifestyle.

The clinician will give you an outline of the report content, time to ask questions and seek clarification.

Confidentiality & Reports

During the occupational health assessment, the clinician will be making notes (clinical case notes/records). These are kept by occupational health for 6-7 years. After this time, they will be destroyed in a secure manner.

A management report will provide advice to your employer. It will answer the specific questions asked in the referral form. The clinician will verbally outline the report content and ask for your consent to send the report.

In the assessment you will be asked if you want to receive the report before it is sent to the referring people.

We do not release the report to anyone unless you give consent to do so.

A copy of the report will be automatically sent to you.

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You can withhold consent for the release of the report at any stage. If this is the case the clinician will discuss your concerns with you to try and resolve; for instance, re wording. The referring people/person will be informed if consent is withheld. The employer may then continue to make decisions without having the occupational health professional opinion which could be detrimental to you.

The Privacy Statement can be found [here](#).

Cancellations

We will need to notify your employer of any cancellation or non-attendance. Please be aware should you be unable to attend an appointment and cancellation is not received within 24 hours of an appointment then this would result in a full charge to your employer.