

**EMPLOYEE HEALTH AND WELLBEING UNIT  
GUIDANCE FOR MANAGERS:  
COMPLETING THE EHWB  
MANAGEMENT REFERRAL FORM**

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**Purpose of Employee Health and Wellbeing Unit (OH) referral:**

- To generate solutions where health affects work or work affects health
- To give employees an opportunity to raise health issues and how they are impacting on work
- To seek independent professional advice on health issues to support management action
- To assist with short term sickness absences where management action alone has not improved attendance
- To assist with the management of long term absenteeism

**It is not...**

- To explore the legitimacy of absences
- To solely “comply with BDMC Managing Attendance policy and procedures on managing absences”
- A punitive or disciplinary process
- A treatment service – We do not duplicate services provided by GP or other healthcare specialties and **we are unable to influence NHS waiting lists**

**When to refer an employee:**

- Frequent short term absences
- Concerns about their health at work (e.g. change in performance, behaviour or attendance)
- Concerns about the effect of work on health
- Mental health/stress issues if absent for more than 2 weeks
- Longer term absences (more than 4 weeks)
- Functional assessment to establish fitness to perform specific tasks and duties in their current role.

**What to put in referral:**

To get specific and relevant advice, you need to ask specific and relevant questions. Consider what action you may need to take and what information you will require and ask questions that will generate that information. If in doubt contact Occupational Health or your HR Officer. You may want to speak with an OH Advisor prior to referring an individual to discuss concerns or advice you require.

***Background information to include:***

- Nature of duties including any hazards (i.e. copies of risk assessments)
- Relevant employment details – length of service, nature of working environment, working hours, any capability, disciplinary or industrial injury issues
- Details of absences. Please do not send photocopies of fit notes. It would be more helpful if you send brief summaries of relevant and current information
- Main concerns and reason for referral: To include what measures and adjustments have been discussed and/or tried to help the individual in the workplace. The more information you give us the better able we are to give you a balanced opinion of the situation
- If medical retirement is being contemplated as a possible action this must be made clear in the referral so that a firm prognosis can be provided

**What to ask.... Some suggestions to consider:**

- Is there an underlying health problem that affects attendance/performance/fitness to work?
- Is the employee medically fit for the post? If not, when are they likely to be medically fit for the post?
- When is the employee likely to return to work?
- Is the employee likely to provide a regular and effective service?
- What reasonable adjustments are required to be considered to keep the employee at work/assist the employee back to work?
- Is the employee likely to come under the remit of the Equality Act 2010, formerly the Disability Discrimination Act 1995. (Please note, that ultimately the final decision about the Equality Act 2010 eligibility is a legal one, not a medical one)

**Procedure****Request for EHWB Assessment:**

All referrals to EHWB must be submitted on an EHWB Management Referral Form, which can be found on the EHWB website.

**The Manager and the employee must discuss the reason for a referral.**

It is important that both employee and referring manager understand the purpose of the referral taking into account the above points. There is a common misconception that employees are only referred when there is doubt about the legitimacy of their absences or when they are going to be disciplined or taken down the route of capability. Unfortunately this can limit the usefulness of the service as individuals are understandably suspicious and less prepared to be open. It is therefore vital that employees understand that EHWB is there for their benefit as well as for their employer.

**Manager to complete, sign and send the referral to EHWB.**

It is important to bear in mind that any correspondence received by EHWB about an employee becomes part of their EHWB file and that the employee will be shown the referral. The employee has a legal right of access to these records under the Data Protection Act 1998 and Access to Medical Records Act 1988. It is the referring manager's responsibility to give a copy of the referral form to Human Resources and inform the Employee of the referral.

**EHWB will advise employee, manager and HR Officer of date and time of appointment:**

The appointment will be held City Hall, Ground Floor, Centenary Square BD1 1HY or via the telephone. In some rare cases the most convenient location or a home visit maybe considered.

**Consultation:**

During the consultation the contents of the referral will be discussed and an assessment of their health issues and the impact this has on their work will be undertaken. Please note that clinical and personal details will remain confidential unless consent is given.

**The Occupational Health Report**

This will be sent following consultation. The content of the Occupational Health Report is discussed with the employee at the consultation. There may be a delay in sending this as the employee has the right to see the report before it is sent to the manager. It is their right to do so (GMC guidance on Confidentiality: Sept 09) and if they request this you will be informed in writing of any delay. If the employee does not give consent for the Occupational Health Report to be released, they will be informed that their manager will only be able to act on the information already available to them and you will be informed, in writing. You will then be required to take the necessary action based on the information already available.

**Correspondence:**

All Occupational Health Report letters will be sent by e-mail as a password-protected attachment. The password can be obtained by ringing 01274 434246. This may also be shared with the employee. Please note the password is changed at regular intervals.

**GP/Specialist reports:**

Where it is necessary to obtain further medical information, we may apply for a medical report from the employee's own GP or specialist. This may delay full answers to your questions in the Occupational Health Report. Once the report has been received by OH it will be interpreted and the report will be sent to you explaining the findings.

**Answers to your specific questions:**

If we are unable to answer your questions fully at the first session, it may be necessary for us to make a further appointment. Where it becomes apparent that we cannot progress a case after two appointments, we will endeavour to contact you to discuss further.

**If you have any further questions, please contact Employee Health and Wellbeing Unit on 01274 434246**