**GUIDANCE ON THE PROCEDURE FOR OCCUPATIONAL HEALTH REFERRALS**

**OF**

**EMPLOYEES/ POST-GRADUATE STUDENTS/ UNDER-GRADUATE STUDENTS**

**Scope**

This paper provides guidance for the referral of employees/ post-graduate and under-graduate students to The University of Manchester Occupational Health Service.

**Role of the Service**

The service is not a Primary Care provider.

The role of Occupational Health is to advise Human Resources/ Managers/ Tutors etc.

Staff and Students, where there may be concern that the nature of their work/ study is affecting their health and where their health may have implications for their work/ study.

Those seen, whether referred or self-referred, can be reassured that at all times they will be treated with courtesy and understanding.

**Confidentiality**

Employees/ PGs/ UGs can be reassured that any medical information supplied/ provided/ obtained, in relation to the consultation will remain strictly confidential to the Professionals within the service. No medical or personal details will be divulged to Management/ Personnel etc., without an individual’s written/ informed consent (there are a limited number of situations where this does not apply e.g. where there is considered a real risk to the individual or others).

**Procedure**

Occupational Health operates an open and confidential service for all employees and students. Individuals may be seen as follows:-

* Referrals from Management/ Human Resources/ Supervisors/ Tutors etc: Individuals may be seen following a formal referral to the service. In these cases following an assessment a response will be provided having first gained consent from the individual as to the information/ details to be included. If requested they will also be provided with a copy of the report and (except in a limited number of situations) they have the right to withdraw consent for such a report to be sent.
* Self-Referral: Individuals can make their own arrangements to be seen if they have any relevant concerns. In these cases the consultation is strictly confidential and no reports are provided unless specifically requested by the individual concerned.
* Statutory Appointments: Appointments are arranged, where necessary, for health surveillance required under legislation or as a result of University policies.

**Referrals**

* Depending on whether the individual being referred is an employee/ post-graduate or under-graduate student the referral may come from a variety of sources. In the case of staff it is normally Human Resources (in consultation with Line Management) and for students it may be their personal Tutor, Academic Adviser, School Disability Support, Co-Ordinator or other Support Services etc. In all cases the individual should be aware not only that the referral is being made but of the detailed reasons for the request.
* Some examples of reasons for referral are as follows:-
  + The individual has a medical condition which may be affecting their ability to work/ study.
  + The individual believes that they have developed a medical condition as a result of their work/ study.
  + The Line Manager/ Referrer has noted a change in performance or behaviour etc.
  + The individual has a pattern of recurrent short-term or extended period of long-term sickness absence (see Sickness Absence Policy and procedures).
* Those making the referral, and if indicated any other e.g. Line Manager, Heads of School etc., will be informed of the date and time of the appointment and will receive a subsequent report. A copy of the information normally sent to the employee/ student with the referral letter is enclosed as Appendix 1a (Staff) and Appendix 1b (Students).
* Referrals for staff are usually in the form of a letter and Appendix 2 gives details of the information/ questions which should normally be included in any staff referral letter. In the case of referrals for students the Student Support Services Referral form (Appendix 3) should be used.
* At the start of the consultation the Occupational Health Adviser/ Physician confirms that the individual is aware of the reason for the referral and the questions which have been asked. At the conclusion they will be aware of the details to be included within the report and will be asked to provide informed consent. The individual has a right to withdraw consent (with a limited number of exclusions e.g. in the case of statutory medical examination or where it is considered there may be a risk to the individual or others) and to be provided with a copy of the report.

**The Occupational Health Report**

The subsequent Occupational Health report will include:-

* Answers to any questions included in the referral letter;
* The need for modification of duties and/ or work situation/ schedules etc (temporary or permanent).
* Whilst essentially a legal definition advice will be provided as to whether the individual is likely to qualify as disabled under the Equality Act.
* The advisability of a recuperative or rehabilitation programme on the initial return to work. This advice is not usually prescriptive recognising that such a programme must be acceptable to all concerned. However, general guidance is usually provided.

Please Note: It is up to Management/ Tutors (or the appropriate person in the School) to decide whether such adjustments, as recommended, are reasonable, and in the case of Students studying for courses subject to regulatory bodies, whether, with such adjustments, the Student will still be able to fulfil the core competencies of the course.

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|  | **APPENDIX 1a:** |
|  | **YOUR REFERRAL TO THE OCCUPATIONAL HEALTH SERVICE** |
| The Doctors and Nurses at the Occupational Health Service are specialists concerned with the effect of work on health and conversely the effect of health on work. They provide a communication bridge between you, your own Doctor and/ or Specialist, your Line Manager and Human Resources. You may have been referred as a result of concern or following a period of recurrent absence or a more prolonged period of absence. Whatever the reason the Occupational Physician/ Nurse will have been asked to see and examine you (if appropriate) and answer a series of questions. Prior to any referral your Line/ HR Manager will have explained the reason and purpose of the referral and indeed you have a right to know the details of what is being asked.  **Whatever the reason for the referral our aim is, wherever possible, to ensure that you are fit and well at work.**  ***Who will you see?***  You will be seen by a qualified Nurse or Doctor both with additional specialist qualifications in occupational medicine.  ***How long will the appointment last?***  Please allow up to 45 minutes for an appointment. It may well be considered appropriate to arrange a further/ review appointment but this will be discussed with you.  ***What will happen during the consultation?***  The Doctor/ Nurse will take a history and ask you questions about your health and your work and anything else which may be relevant to the situation. If appropriate, the Doctor may undertake a relevant physical examination. During the consultation you will have the opportunity to discuss any concerns you may have about your work and your health. At the end of the consultation the Doctor/ Nurse will discuss and provide a detailed summary of his/ her opinion and the answers to the questions asked by Management/ Human Resources.  ***Is the consultation confidential?***  The information you provide is treated as confidential and only in exceptional circumstances, and with your informed consent, is it necessary to divulge any clinical information.  ***The outcome of the consultation?***  Following the consultation the Doctor/ Nurse will discuss his/ her answers to the questions posed by your Line/ HR Manager. These usually cover practical issues e.g. fitness to continue/ return to work, the need for any recuperative programme, practical adjustments etc. etc. You have the right to see any report and indeed can be provided with a copy if you so wish.  ***Do we always send a report?***  If you have been referred formally by your Line/ HR Manager we will send them both a report. However, employees also have the right to make a self referral to the service if they wish to discuss any issues concerning work/ health. In these cases no report is sent to Management/ HR unless it is mutually agreed that this would be helpful.  **I hope that the information provided here is reassuring to you but you will be given the opportunity to discuss any further details/ concerns at the start of any consultation.**  **Dr Susan A Robson MB BS DIH MFFP FFOM FRCP**  **Consultant Occupational Physician**  **Director: Occupational Health Service** | |

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|  | **APPENDIX 1b:** |

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|  | **YOUR REFERRAL TO THE OCCUPATIONAL HEALTH SERVICE** |
| The Doctors and Nurses at the Occupational Health Service are specialists concerned with the effect of study on health and conversely the effect of health on study. They provide a communication bridge between you, your own Doctor and/ or Specialist, and the person making the referral. You may have been referred as a result of concern or following a period of recurrent absence or a more prolonged period of absence. Whatever the reason the Occupational Physician/ Nurse will have been asked to see and examine you (if appropriate) and answer a series of questions. The person making the referral will have explained the reason and purpose of the referral and indeed you have a right to know the details of what is being asked.  **Whatever the reason for the referral our aim is, wherever possible, to ensure that you are fit and well at University.**  ***Who will you see?***  You will be seen by a qualified Nurse or Doctor both with additional specialist qualifications in occupational medicine.  ***How long will the appointment last?***  Please allow up to 45 minutes for an appointment. It may well be considered appropriate to arrange a further/ review appointment but this will be discussed with you.  ***What will happen during the consultation?***  The Doctor/ Nurse will take a history and ask you questions about your health and your course of study and anything else which may be relevant to the situation. If appropriate, the Doctor may undertake a relevant physical examination. During the consultation you will have the opportunity to discuss any concerns you may have about your course of study and your health. At the end of the consultation the Doctor/ Nurse will discuss and provide a detailed summary of his/ her opinion and the answers to the questions asked by the individual making the referral.  ***Is the consultation confidential?***  The information you provide is treated as confidential and only in exceptional circumstances, and with your informed consent, is it necessary to divulge any clinical information.  ***The outcome of the consultation?***  Following the consultation the Doctor/ Nurse will discuss his/ her answers to the questions posed by the individual making the referral. These usually cover practical issues e.g. fitness to continue to study, the need for any recuperative programme, practical adjustments etc. etc. You have the right to see any report and indeed can be provided with a copy if you so wish.  ***Do we always send a report?***  If you have been referred formally we will send a report. However, Students also have the right to make a self referral to the service if they wish to discuss any issues concerning study/ health. In these cases no report is sent unless it is mutually agreed that this would be helpful.  **I hope that the information provided here is reassuring to you but you will be given the opportunity to discuss any further details/ concerns at the start of any consultation.**  **Dr Susan A Robson MB BS DIH MFFP FFOM FRCP**  **Consultant Occupational Physician**  **Director: Occupational Health Service** | |

**APPENDIX 2: GUIDANCE:**

**Information to be included in any Staff etc., referral to the Occupational Health Service**

The following information should, if possible, be included in any referral be it for advice in relation to sickness absence (recurrent, short term or long term) or for any other reason.

**It is important that the Employee is aware of the referral and the reason it is being made.**

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| Name of Human Resources contact address and telephone number |  |
| Name of Employee: |  |
| Employee Location: |  |
| Date of Birth: |  |
| Home Address: |  |
| Contact Number: |  |
| Job Title: |  |
| Start Date: |  |
| Line Manager: |  |
| Line Manager Contact Details: |  |

**Additionally, it would be helpful to have the following information:-**

* How long the person has been employed; type of contract e.g. temporary, part time etc.
* Previous attendance; sickness absence and cause (it is important that a list is provided especially if the reason for referral is recurrent short term absence).
* Any other relevant factors e.g. disciplinary issues, relationships, motivational issues, performance etc.
* Any facilities for reasonable adjustments which should include the possibility of modifications to the present contract etc.
* Any facility/ willingness to arrange rehabilitation on return to work.
* Any facility/ willingness to explore the possibility of redeployment.

**You may wish to pose a number of questions to be answered by the Occupational Health Service which may include the following:-**

* Whether fit for work at present and if not the likely length of absence and prognosis as to when will be fit to return and give consistent service for the future.
* Fitness to return to restricted duties; time/ type or both and length of restriction.
* Whilst essentially a legal definition, whether the individual is likely to qualify as disabled under the Equality Act.
* Advice regarding adjustments which may be necessary.
* Whether necessary for the individual to continue to take medication and if this is likely to have implications for work etc.
* Whether there is the need to take time away from work for hospital/ General Practitioner appointments etc.
* Is it likely that the individual will qualify now or in the future for ill health retirement under the rules of the relevant pension scheme?
* Is this a Management and not a medical issue?

Plus any other relevant questions.

**APPENDIX 3: REFERRAL FORM FOR STUDENTS**

**REFERRAL FORM**

**TO**

**THE UNIVERSITY SUPPORT SERVICES**

(The Counselling Service: Disability Support Office: Student Occupational Health)

If you are concerned that a student’s medical condition (which may include physical and/ or mental health problems) is impacting on their ability to attend the course; their performance with course work and examinations etc., please complete the following referral form and send to the appropriate support service. Students’ consent for a referral must be sought and if consent is refused the tutor/appropriate person must make a note on the student’s file of the reason referral was suggested and that the student refused. The student must be made aware that the support that can be provided may be affected by their refusal to attend the appropriate support service.

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| **Student’s Full Name:** |  |
| **Date of Birth:** |  |
| **Address:** |  |
| **Mobile Telephone Number:** |  |
| **University Email:** |  |
| **Personal Email:** |  |
| **Course:** |  |
| **Year of Entry:** |  |
| *Please give a brief statement of the issues giving rise to concern e.g. repeated short term sickness, academic performance etc:* | |
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| *Please state what advice is required:* | |
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| Referral sent to*: Please tick appropriate box:*  Counselling Service ❒  Disability Support Office ❒  Student Occupational Health Service ❒  Other *(please state)* ❒ | |
| Name of Person Making Referral: |  |
| Position / Relationship to Student: |  |
| Date: |  |
| Contact Telephone Number: |  |
| University Email: |  |
| Address: |  |
| School / Course: |  |

***NB Please note: It is essential that the student is aware that the referral is being made and the reasons why this is considered appropriate.***

**Address& Contact Details**

**The Counselling Service**5th Floor Crawford House  
Tel: 52864 Email: counsel.service@manchester.ac.uk

**The Disability Support Office**2nd Floor University Place  
Tel: 57512 Email: dso@manchester.ac.uk

**Occupational Health Services**Waterloo Place  
182-184 Oxford Road  
Tel: 52858 Email: waterlooocchealth@manchester.ac.uk