

# OH BRIEFING PACK FOR MANAGERS



*Getting the best out of PAM Occupational Health*

# How do I make a Good Referral?



PAM  
OH Solutions

## *Before you make a referral*

- Find ways to support the colleague at work or to return to work
- Evidence shows that remaining at work or making an early return is the most helpful thing to do in most instances.
- Complete the correct referral form and ensure it is signed

**Referral Form - Hill Harry**

Personal Details	Contact Details	Employment Details	Referring Manager
<b>Hill Harry</b> DOB: 23/11/1981	Unit 125 Warrack Ind Est Warrington Cheshire WA3 3SP Tel: 019424107040 / 07568566969 Email: Are the employee's personal details correct? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="button" value="Cancel"/>	<b>Client:</b> Warrington Co (Toluburton) Ltd <b>Department:</b> Warehouse <b>Job Title:</b> Warehouse Operative	<b>Referring Manager</b> Albert Trolan <input checked="" type="checkbox"/>

**Referral Details Step 2.1 About The Employee >**

Has employee been advised a referral is being arranged?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	First Date of illness 04/03/2014
Is the employee still working?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	First Date of absence 06/05/2014
Is the employee in work currently?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Can short term work piece adjustments be made?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

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## Steps to making a good OH referral:

- Make sure that you inform the colleague why you are making a referral and how the OH advice will be used
- Prepare them for their appointment by ensuring they confirm they will be attending and remind them of the importance of attending
- Home visits are a welfare matter and would only involve OH in very exceptional instances, with prior agreement and with a manager

The screenshot shows a web form titled "Referral Details Step 2.2: About The Referral". It contains several sections for input:

- Reason for Referral:** A list of reasons with checkboxes:
  - Short Term Absence
  - Long Term Absence
  - Heavy Work / Health Screening
  - Prohibited
  - Employee's choice
  - Other
  - I received a specific work-related issue (provide date below)
  - 21 days absence - longer than or likely to be longer than
  - Issues under level 1 screening
  - It will not be full duties
  - Employee needs a better consultation
  - Other (manager to contact about employee)
- Employee Reason for Absence:** A text area for the employee's input.
- Manager add comments:** A larger text area for the manager's input.
- Initial Referral:** A dropdown menu with "Please select" as the current value.
- Service Required:** A dropdown menu with "Drug & Alcohol Screening" as the current value.
- Do you require a pre-consultation meeting with our client?** Radio buttons for "Yes" and "No", with "No" selected.
- Do you require a post-consultation meeting with our client?** Radio buttons for "Yes", "No", and "Waiver", with "No" selected. A text field for "Waiver control number" is visible to the right.



## Briefing your colleague

- Make sure the colleague is aware that it is a one to one meeting in private
- Focus your referral on the positive. Ask what the colleague **CAN** carry out now or **COULD** do with some help. Don't focus on the negative or limiting effects of the injury, condition or illness
- Explain what physical functions the colleague's job involves, and what workplace adjustments you've tried to resolve the problem

**Referral Details** Step 2.3 Management Information >

**Employee Absence History:**

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**Advice Required from Occupational Health:**

- What is the employee's current fitness for work?
- Likely date of return to work?
- What effect will this condition have on the employee's ability to carry out his/her duties?
- Are there any modifications / adjustments which would alleviate the condition or aid rehabilitation?
- Are there any particular duties the employee cannot do?
- What duties can the employee perform?
- Is the condition likely to re-occur in the future?

Please provide any supporting documents that are relevant to the referral.



## *Getting the most from the report*

- Don't ask for information about things you already know
- Provide supporting information e.g. stress risk assessments, other reports etc.
- Don't expect OH to tell you how to manage your case – they give advice for you to consider alongside your other information
- Don't accept a report if you don't understand it or it hasn't answered your questions



- When a report is completed it is provided directly to the employer it is their responsibility to discuss its contents with their employee
- All consultation documents are stored confidentially on PAM's computer systems.