Occupational Health Referral: A Guide for Employees

1. Introduction to Occupational Health

Occupational Health (OH) is a specialised medical service that supports your health and wellbeing in relation to your job. If health issues affect your ability to work or your work is affecting your health, your employer may refer you to OH for expert, impartial advice. The aim is to help you stay healthy at work or return to work safely.

2. What to Expect from Your Occupational Health Assessment

This guidance takes the format of frequently asked questions about the Occupational Health Referral process. If you cannot find the answer to your query, please contact your line manager or Human Resources for further assistance.

What is an Occupational Health Assessment?
The purpose of the assessment is to provide clear, impartial and professional Occupational Health (OH) advice to the employer (usually your line manager and Human Resources), and the employee. The assessment is usually conducted at a face-to-face consultation with an OH Physician. The OH Assessment is not meant to give you or the employer a diagnosis about your health; its primary aim is to educate and inform Management about the situation.

Do I need an Occupational Health Assessment?
Your line manager has referred you to OH to address any health issues that you have and the likely impact on your work. The OH professional will review all the circumstances relating to your referral, thereby providing you and your employer with fair and objective advice about your health and work, both in the short and long term. In this way your line manager can ensure that, where practicable, you receive the support that you need to do your job.

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Why can't my GP carry out the assessment?
Your GP is the expert when it comes to treating illnesses. However, the OH Physician is more familiar with your work and the workplace. They are the experts on how your health can affect work, how work can affect your health and what can be implemented at work to help and support you in the workplace.

If the OH Physician needs more detailed information on your health, treatment plans or results of investigations to complete an assessment, the OH Physician will, with your informed, written consent, contact your GP and/or Specialist for the information.

Do I have to attend an Occupational Health assessment?
If you are unsure or unhappy about why you have been referred, or if you don't wish to attend, you should address this with your line manager. Your manager will then (with the support of HR, where appropriate) try to address your concerns. If you do not attend the appointment, your manager and HR will only be able to make decisions based on the information they currently have.

You must advise HR as soon as possible if you are unable to attend your appointment so that this can be rearranged. If you do not attend a charge will still be made to the Company for the appointment.

What happens at and after my assessment?
Your consultation with the OH Physician is likely to last around 30–60 minutes. Normally, they will discuss the health issues that have led to the referral and, if relevant, the absence from work. This normally leads to discussions about your health problems and their effects and any treatment you are receiving.

The Physician will then wish to relate these matters to your job to gain an understanding of how your health affects your ability to carry out your normal duties.

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What information is passed to my employer?
You will be asked to sign a consent form showing that you agree to have the assessment and also to OH providing a written outcome report to your employer.

The report is deemed private and confidential and copies will only be sent to your line manager and the HR Business Partner allocated to your case.

The OH Physician will normally produce a report for your referring manager and Human Resources that covers the issues raised in the referral. The report will deal with the functional work issues rather than the clinical (medical) issues. Functional means what you can or cannot do at work and over what time scales. This way you can be reassured that the highly confidential clinical (medical) aspects can remain strictly between you and the OH professional, unless your referring manager or Human Resources are already aware of the details or if you agree for such information to be passed to your employer.

Once HR have received the report, a meeting will be arranged to discuss the contents with you, so that any actions by you or your department can be agreed and implemented. The aim of the process is to better understand any health issues you may have which are having a detrimental effect on your ability to do your job, and to consider, with expert medical advice, what actions both you and your employer should take.

Are the Physician's recommendations binding?
Recommendations are not binding and are simply recommendations. It is for your employer to assess whether the recommendations are practical and reasonable to implement in the circumstances.

How are the confidential OH records maintained?
Medical records on individual employees are maintained to the same high standard of confidentiality as hospital or GP records, in accordance with the GDPR 2018 regulations.

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They will only be disclosed outside the Occupational Health Department with your consent.

The Occupational Health Department may also keep some information on a computerised database for administrative and health statistical purposes. Exactly the same standards of confidentiality will apply.

Do I have the right of access to the OH reports written about me?
Yes you do, your right of access to OH reports written about you is enshrined within the GDPR 2018 regulations.

If you would like to see the report before it goes to your employer then you should indicate this on the referral form, otherwise you will receive a copy at the same time.

Will there be any need for you to contact my GP or Hospital Specialist?
Occasionally the OH professional will seek, with your permission, a report from your GP or specialist to supplement the OH assessment. This is usually if the OH professional requires further clinical information regarding your case, for example information regarding diagnosis, investigations and treatment plans.

The process is subject to the Access to Medical Reports Act 1988. You have to give your consent before your doctors are approached and you have the right of access to these reports before they are forwarded to OH. Because of these requirements the process can take a few weeks and it will be normal for an interim report to be provided to your line manager and Human Resources. A more definitive report will be forwarded after your doctor's report has been received by the OH Department.

Under some circumstances the OH professional may write to your GP, with your consent, giving information about the outcome of your assessment. This can be particularly helpful where there are any findings or work arrangements that the OH professional thinks your GP should be made aware of.

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What should I bring with me to the assessment?

- Your appointment confirmation
- Any medication or a list of medication that you have been taking
- Any other information that you think may be relevant to your assessment

3. Your Rights and Responsibilities

- Consent: You must give written consent for the assessment and for sharing the OH report.
- Confidentiality: All medical details remain confidential unless you agree otherwise.
- Access: You can request to see the OH report before it is shared with your employer.
- Choice: You can refuse to attend, but your employer may make decisions based on the available information.

4. Additional FAQs

- Q1: What happens after the assessment? A: A meeting may be arranged with you and your manager to discuss any recommended adjustments or next steps.

- Q2: Can OH contact my GP or specialist? A: Only with your written consent, and you have the right to view the report first.

5. Where to Get Help

If you have concerns about your referral, contact:

- Your line manager
- Your HR department
- The Occupational Health Service directly

This guide is based on UK guidelines including GDPR 2018, the Access to Medical Reports Act 1988, and HSE best practice.