**UNIVERSITY OF DUNDEE**

**Occupational Health Service**

**GUIDANCE NOTES FOR COMPLETION OF MANAGEMENT REFERRAL FORM**

Prior to completing the referral to Occupational Health, the manager or referring HR officer must ensure that the employee is fully aware of the referral, what is being said within the referral and the questions Occupational Health have been asked to advise upon.

**SECTION 1: EMPLOYEE DETAILS**

You must fill in all areas of this section. It is vital that Occupational Health to have correct details in order to maintain confidentiality when sending a copy of the completed report following consultation with the employee.

You must state the preferred contact details to allow the OHA or OHP to contact the employee on the correct number.

Please attach the job description of the employee being referred – this allows Occupational Health to have a better understanding of how the employee’s condition will affect their ability to perform their role.

**SECTION 2: EMPLOYMENT DETAILS**

Please complete all areas of this section – the Directorate is used for statistical purposes.

Please ensure that you tick the risks or hazards associated with the employee’s role. Occupational Health require this information to assist with recommendations and advice regarding modifications the employee may require at or returning to work and/or to comment and advise on abilities of the employee can undertake their role.

**SECTION 3: HISTORY**

It is important to fill in all the areas requested in this section with as much detail as possible about why the employee is absent or requires referral. The more information available the better Occupational Health will be to provide the appropriate advice.

Please ensure you attach the GP Fit note and the sickness absence record of the employee for the year leading up to absence or referral.

**SECTION 4: QUESTIONS**

This section is where the referring Manager or Referring HR Officer has the opportunity to indicate which questions, they wish the Occupational Health Advisor or Physician to answer. There is a space for the referring Manager or HR Officer to ask specific questions pertaining to the needs of the employee with regards to their absence and/or return to work. Please do not ask too many questions in any one referral as the OHA is restricted to a time limit during each referral.

Each question has a tick box which needs to be either ticked or an X placed if an answer to that question is required e.g. **Is the employee fit to return to work?** **X**

**SECTION 5: REFERRAL MADE BY**

The information in this section is required to allow Occupational Health to send the Report to the correct Manager and HR Officer. Please complete all of the requested information.

**MEMORY AID**

There is a handy memory aid at the bottom of the Referral Form to ensure all the documentation has been attached and the appropriate information completed.

Once the completed Management Referral form is received Occupational Health will contact the employee to arrange an appointment and will advise the Referring Manager or HR Officer of the date and time. Every Appointment must be CONFIRMED by the employee at least 24 hours prior to the arranged time: if not it will be rescheduled for a later date and management informed.