

MARISH



Academy Trust

Managing Attendance Policy Annex 3 Referring Employees to Occupational Health

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1. Referring Employees to Occupational Health

The line manager/designated person may refer an employee to Occupational Health at any time within this procedure to establish the employee's medical situation. In any event, a referral should be made after a continuous sickness absence of 4 weeks. Advice must be sought from Occupational Health prior to any action within the scope of the Contract Review Hearing stage.

Where the reason for an employee's sickness absence is given as stress/depression or some other mental health condition, whether work related or not, steps should be taken to refer the employee to occupational health as soon as possible.

To refer an employee to Occupational Health please see Appendix 1.

The Occupational Health doctor/adviser will investigate the employee's medical position and advise the school about the employee's fitness to return to work and to undertake the duties of the post, on the information available to them. It is therefore crucial that the Management Referral Form is completed in full and any related information is attached.

Employees have the right to access their medical information and to receive copies of medical reports consistent with the General Data Protection Regulation (GDPR) and Data Protection Act 2018. The employee should be informed about the decision to refer them to Occupational Health and the reasons why. The employee can choose to view the information contained in the occupational health report prior to it being sent to the school and Schools HR and make comments.

The employee's consent will be sought where the Occupational Health doctor considers that an examination by an independent medical specialist is required or that contact with the employee's general practitioner would be helpful. If the employee does not give consent to the disclosure of medical records or to be examined, decisions will be taken on all other available information.

If the employee does not accept the recommendations of the Occupational Health doctor, they must notify the Headteacher/Designated Line Manager if they wish to seek an independent specialist medical opinion within 10 working days of receiving the medical report from Occupational Health. The employee's independent medical report must be submitted to the Headteacher/Designated Line Manager as soon as reasonably practicable but this will not delay the process. For example, in dismissal cases, where it is not possible for the employee's independent report to be submitted before the person's last day of service, the

notice period will not be extended.

Appendix 1 Referral to Occupational Health Process/Guidance

Occupational Health services are delivered through Medigold Health. Any reference to occupational health in this document should be taken to mean Medigold Health.

Prior to referral:

- Please inform the employee that they are going to be referred to Occupational Health and the reasons for this. In addition you may wish to provide them with a copy of the Occupational Health - Guide for Employees at Appendix 3 for information which also includes directions to the occupational health clinics.

Medical referral process:

- The Headteacher/Designated Line Manager completes the Management Referral Form available at <https://www.medigoldone.com/Responses/2762> using the password: SchoolsHRMR

Please complete the Management Referral Form and submit. You may find the guidance on What Makes a Good Referral at Appendix 2 helpful when completing the form.

Once the form has been submitted, a PDF version will be emailed to the email address provided under the 'Referrer' details section of the form.

- Occupational Health will acknowledge receipt of the referral and will arrange for an appointment to be set up for a consultation within 10 working days of the referral.
- Occupational Health will determine whether the employee should be seen by a Doctor or Nurse as appropriate. They may also consider that a telephone consultation may be appropriate instead of a face to face consultation.
- The medical report will be emailed to the school within 5 working days of the appointment with a copy to Schools HR Co-operative. Where the employee has asked to view the contents of the report prior to it being sent to the school, this may affect the timeframes indicated.

Medical Advice and Support

If you wish to discuss the case with a clinician prior to submitting a referral, or wish to discuss the contents of the occupational health report, please contact the Medigold Health Customer Service Team on 0845 127 8888 opt 7, or email them at medigoldcs5@medigold-health.com . The team will then arrange a suitable time for a telephone discussion with the Duty Manager or the author of the report, respectively.

Please quote The Schools HR Co-operative in all communications.

What makes a good referral.....?

This guide has been produced to give line managers advice on what is required when making a sickness absence referral to Medigold. The more information you provide, the better the quality of the reports that will be produced to enable you to manage the referral issue.

Reason for Referral

It's important that the reason for referral is clearly explained so that the clinician can understand why the employee has been referred. When completing the management referral form please provide the following as a minimum:

- Why you are referring the employee at this time;
- Outline the management action you will be considering when you get the report;
- Provide the employee's absence details;
- State whether the employee is currently absent from work;
- State the diagnosis on their medical/self-certificate;
- Identify the first day of the employee's absence; and
- State whether you have a confirmed return to work date or an indication from the employee's GP as to how long they may be absent

Background History

The more background you can provide the better response you should receive from the clinician.

Remember to provide any information that you have which you believe may be relevant, for example:

- Is the employee's attendance pattern causing concern?
- Is the employee able to carry out their job?
- Is there a rehabilitation plan in place that has not progressed as expected?
- Does the employee have any previous history of their current condition?

- Are there any personal issues?
- Does the employee's condition impact on their social/domestic activities that you are aware of?
- Is the individual expected to return to work at any point in the future?
- Has the employee entered into a formal management process?

Management Contact

From the regular contact that you have maintained as part of the absence process you should be able to provide a lot of information to Medigold before the individual is assessed. Things to consider include:

- Are there any perceived barriers to returning to work? For example, immobility, physical limitations, surgery, conflicts at work or with management?

Is the employee due to see their GP or a specialist in the future?

- Are you aware of any external support the individual may be receiving, for example physiotherapy or counselling?
- Have you already discussed any potential adjustments, e.g. hours, duties etc.

Please also provide details of how you have obtained the information from the individual (for example, through telephone contact or face-to-face meeting) to ensure that there is no duplication of investigatory activity following your referral.

Adjustments or Modifications

In some cases you may have brought an individual back to work on adjusted duties but still require Medigold advice. So you should cover the following with any referral that you make:

- Has there been a local agreement on adjusting the individual's work practice?
- If so, was it successful? If not, what difficulties was the individual experiencing?
- Were these adjustments made due to the equality act?

Further Flexibilities

It is important that you let Medigold know what available work or redeployment opportunities there is in their area and what further adjustments the business could support. You should therefore include information on the adjustments and modifications you could reasonably support and for how long. Examples include a rehabilitation plan, alternative work patterns, contractual changes, alternative office locations, job share and so on.

Duties

It is also important that Medigold knows about the role the individual is contracted to so that this can be taken into account if rehabilitation is required. You should either include a copy of the job description or include the following details:

- The role the employee is contracted to do;
- Whether the employee works full time or part time or works shifts or overtime;
- The type of work the employee does e.g., clerical or administrative, DSE user etc.;
- Whether the employee's role involves repetitive tasks driving, walking or using specific machinery;
- Any unusual aspects of the role

Any other relevant information

Is there any other information, which would help the scrutiny practitioners manage and route this case appropriately? For example:

- Is there a date for a dismissal hearing or performance review?
- Are there any outcomes from appeals or conduct meetings; or
- Is the employee undertaking other work outside of the organisation.

Specific questions

Make sure that any question you want addressed is added to the referral form. To do this you should outline any other issues that you would like addressed, specific to this individual and the current referral. Please make sure that you are asking the correct question: Is the individual fit to attend a meeting or is the individual fit to return to work are two very different questions.

Medigold will provide advice on:

- Any adjustments/modifications to the work role or work environment that you should consider if the Equality Act 2010 is likely to apply; and
- A timescale for return to work (where possible) with a rehabilitation plan if appropriate.

They will also comment on future expectations with regards to the particular health condition.

Remember, the more information you provide, the better the quality of the reports that will be produced to enable you to manage your sickness absence.

Appendix 3 Occupational Health - A Guide for Employees

Under the Education (Health Standards) (England) Regulations 2003) anyone appointed to a post involving regular contact with children or young people must be medically fit. Schools have a statutory responsibility to satisfy themselves that individuals have the appropriate level of physical and mental fitness.

What is Occupational Health?

Occupational Health is a medical specialism that looks to protect both employees and employers. It advises on health in the context of work looking at the effects that particular work may have on an individual's health and also considers the effects of their health on their ability and fitness to perform a particular job.

Why am I being referred?

In line with health and safety obligations it is the duty of every employer to consider any health issues that might affect an employer's ability to safely fulfil their job. It is designed to protect both the employee and the employer. This is to ensure that consideration can be given to any adjustments that might be required either in respect of working activities, hours, shifts, levels of absence etc. The employer is required by Health & Safety law (and the Equality Act) to consider this information as a duty of care to its employees.

Confidentiality

To ensure that medical confidentiality is maintained, occupational health specialists are appointed by your employer. All doctors and nurses are medically qualified and specialise in occupational health and associate specialities to ensure you are assessed and your employer advised appropriately. You will be asked to give your consent to allow this access to your medical information. Please be aware that only information that is relevant to your job and or attendance at work will be shared with your employer. You are also entitled to request to see reports that are written and recommendations made.

Should you, for any reason wish to withhold your consent then your employer may have to make decisions regarding your employment without the benefit of important information and occupational health advice. You are strongly advised that if you have any concerns you discuss them with your employer.

What is the Equality Act?

This legislation is to ensure that all individuals are treated fairly and equally in the workplace. It places an obligation on employers to consider reasonable adjustments to recruitment processes, work arrangements and the working environment in order to accommodate disabilities. The Act defines a disability as someone who has an impairment or condition that has a substantial and long-term adverse effect on their ability to carry out normal day to day activities.

Absence/Ill Health Referrals

You may be referred for an occupational health assessment if you have been absent from work or have a health problem that is affecting your attendance or preventing you from carrying out all or parts of your job. You may also sometimes be referred on general welfare grounds to consider how the employer can offer support.

Your employer may need to better understand how long you might be away so that they can ensure your work is covered and can make alternative arrangements in your absence. They may also need to better understand if any adjustments need to be put in place on your return to work with regards to working hours, activities etc.

On occasions the view may be that you will not achieve a return to work, this too is something that may need to be considered by the company.

Occupational health consultation

An occupational health assessment will involve a consultation with an Occupational Health Doctor or Nurse, and at times may require further information to be gathered from your GP or Specialist with your consent. The occupational health assessment will be undertaken either by telephone, or face to face at our occupational health clinic. Medigold Health, providers of occupational health services, will determine this depending on the nature of the case.

Where is the Occupational Health Clinic?

The Occupational Health services are provided in conjunction with Medigold Health.

The Occupational Health Clinic is based at:

Cherry Lane Children's Centre

Sipson Road

West Drayton
Middlesex UB7 9DL

Appointments will normally be on Fridays between 8.30 am and 4.30pm and will be during term-time.
Please report to Cherry Lane Children's Centre's Reception on arrival.

On occasions an additional clinic may be arranged to deal with increased demand for appointments. The additional clinics will be at a different location.

If you have any queries about your occupational health appointment, please contact your school in the first instance.

What happens following a referral to Occupational Health?

- Occupational Health will notify you of the date and time of your appointment. An appointment will generally be provided within 10 working days of Occupational Health receiving the referral from the school.

If you are unable to attend on the given date and time you must notify your school in the first instance.

- When you attend the appointment, you will be seen by an Occupational Health Doctor or Nurse, the process and reasons for referral will be explained to you in full and your signed consent will be obtained to provide the school with a report following the consultation.

- A summary of the information and recommendations will be provided to you at the end of the consultation. You will be offered the option to see the written report when it is sent to the school or before.

- A report will be despatched to the school to enable the school to make the appropriate decisions in relation to your employment.

Appendix 4

Health & Wellbeing Service providing Occupational Health Services

Cherry Lane Children's Centre

Sipson Road

West Drayton

Middlesex UB7 9DL

Cherry Lane Children's Centre is located on the same site as Cherry Lane Primary School.

Transport Links:

Buses: 222

Alight in Cherry Lane. When you get off the bus you will see the school field and you will need to make your way round to the access to Cherry Lane Children's Centre via Sipson Road.

Nearest Tube Station: Uxbridge (Piccadilly & Metropolitan Lines)

Nearest main line railway station (First Great Western): West Drayton

Please contact the Cherry Lane Children's Centre on 01895 671984 if you need assistance with directions.

Parking: There is no parking on site. There is off street parking available in the area close to the Centre.

Revision History

Version	Date	Author	Comments
2.0	Sep 2016	HRM	Based on School's HR Cooperative's Template
3.0	May 2018	HRM	Based on School's HR Cooperative's Template
4.0	Sept 2018	HRM	Based on School's HR Cooperative's Template

Approval History

Version	Approved	Comments
1.0	Jan 2011	Implementation of Slough's Model School Sickness Absence Policy (June 2009).
2.0		
3.0	Sept 2018	By Strategic Board of Governing Body