

Employee Briefing Sheet: Occupational Health Referrals

1. What Is an Occupational Health (OH) Referral?

An **Occupational Health referral** allows your employer to seek independent, professional advice about how your health may affect your work—or how your work may be affecting your health. The aim is to support your wellbeing, your safe return or to remain in work, and identify any reasonable adjustments. It is not a disciplinary process.

2. Why Might an OH Referral Be Made?

You may be referred to OH if:

- You have repeated or long-term sickness absence
 - Your health condition is impacting your performance or attendance
 - You are returning to work after illness or injury
 - You request additional support or adjustments
 - Your manager needs specialist advice to help support you
 - You undertake a role that requires statutory health surveillance
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3. The Occupational Health Referral Process

Step 1: Initial Discussion with Your Manager

Your manager will explain the reason for the referral and answer any questions. You can:

- Share your perspective
- Ask for clarification
- Understand what will be included in the referral

Step 2: Reviewing and Agreeing the Management Referral (MR)

Before the referral is submitted, you should:

- See and review the content of the Management Referral (MR)
- Have the opportunity to ask questions and request amendments if anything is inaccurate or unclear
- If you do not agree with the contents of the referral you will need to discuss with your manager. Any disagreements that cannot be resolved can be included within the referral form so the OH clinician is aware when they undertake an appointment with you. This will enable the referral to go ahead.
- **Formally agree (consent)** to the MR being shared with Occupational Health

This ensures accuracy, transparency, and informed consent.

Step 3: OH Appointment

At your appointment, the clinician will:

- Ask whether you have seen the referral and have consented to it
- Confirm whether you consent to the OH report being sent directly to your employer, or
- Ask whether you wish to see the report first before it is released to your employer

This gives you control over the sharing of your information.

Your appointment may be:

- In person
- By telephone
- Via video call

The clinician will discuss your health, its impact on your work, and any potential adjustments that may help.

You are encouraged to provide open and accurate information and to attend scheduled Occupational Health appointments. This enables Occupational Health professionals to offer appropriate advice and support, and helps ensure timely, informed recommendations for both the individual and the organisation.

Step 4: OH Report

The OH clinician will prepare a report that may include:

- Fitness for work

- Likely recovery times
- Recommended reasonable adjustments
- Advice to support attendance and performance

Only relevant, work-focused information is shared—never detailed medical records.

Step 5: Follow-Up Meeting with your Manager

Your manager will meet with you to:

- Discuss the OH recommendations
- Explore adjustments
- Agree a plan or next step

4. What OH May Ask During the Assessment

Your Health

- Symptoms, diagnosis (if known) and treatment
- Impact on daily activities
- Fluctuations in your condition

Your Work

- Tasks that are difficult at the moment
- Work activities or environments that impact your condition
- What support or adjustments might help

Absence-Related Questions (if relevant)

- Patterns, reasons, or triggers for absence
- Expected duration or recurrence
- Recovery expectations

Their aim is to provide accurate, supportive advice—not to judge or challenge your medical condition.

5. What Occupational Health Does *Not* Do

- OH does *not* make employment or disciplinary decisions
- OH does *not* enforce treatment or override your medical care
- OH does *not* share confidential information without your consent

Their role is independent and advisory.

6. Your Rights

You have the right to:

- Be informed about the reason for referral
 - See, understand, and approve the Management Referral before it is sent
 - Ask questions or request factual amendments
 - Decide whether you want to see the OH report before your employer receives it
 - Request corrections to factual inaccuracies
 - Expect confidentiality regarding medical information
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7. How OH Recommendations May Help

Possible support may include:

- Temporary or permanent adjustments
- Altered duties or tasks
- Adjusted working hours or flexible working
- Phased return to work
- Workstation or equipment changes
- Signposting to wellbeing or counselling services
- Recommending other assessments (e.g. physiotherapy, neurodiversity assessments)
- Redeployment where appropriate

Occupational Health (OH) recommendations are intended to support you at work and provide guidance to your manager; however, they are advisory rather than mandatory. Your manager will discuss the recommendations with you and consider whether they can be put in place, taking into account business and service needs. This may include consideration of your role requirements, service delivery, health and safety, the impact on the wider team, and whether the adjustments are practical and effective. Where adjustments are agreed, these will be reviewed regularly to ensure they continue to meet both your needs and those of the organisation.

Further information

Please see the SharePoint pages [here](#) for more information about Occupational Health and Employee Wellbeing.

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