HOW TO MAKE A GOOD MANAGEMENT REFERRAL

LATUS

Management referrals are for medical issues and not management issues

What we can help with:

- If an employee is medically fit to work in a particular role
- The likely return to work timescales for employees who are absent from work
- The potential impact a medical condition may have on an employee's ability to attend work or carry out their duties whilst at work
- If the Equality Act (2010) might apply
- Whether or not workplace adjustments or restrictions might be helpful (e.g. equipment, alteration of hours, phased return etc.)
- If recurrent short-term absence might be related to medical factors
- If there is a medical reason for any particular trends that have been identified in an employee's absence pattern
- Where an onward referral to counselling or physiotherapy may be a consideration
- If the employee's absence is caused or exacerbated by their work
- If medication is likely to impair an employee's ability to do their job effectively and safely

What to add to the background section:

- History / list of all previous absences
- Any health issues you're aware of, even if not the primary reason for the referral
- Any adjustments you've already tried and whether these were helpful or not.
- If you're aware of any personal issues impacting the employee's wellbeing – or you can simply write that you're aware 'of difficulties outside of the workplace'.
- If you know what support they have in place, please share that with us to (this might be support networks, therapy / Employee Assistance Programme input).
- Whether there are any formal management processes ongoing, for example performance management, sickness absence management, disciplinary or grievance
- Role requirements / up to date job description
- Hazards within role
- Business limitations such as no working from home

Clinician Reports will always cover:

- Medical History
- Relevant Clinical finding
- Justification for work adjustment (if applicable)
- Equality act
- Reliable future service prediction

Appropriate Questions to Ask:

- Where there is a medical condition, is this likely to reoccur?
- If a return to work is not imminent, what treatment or intervention might there be on his/her behalf, which will change his/her situation and when might this be received?
- Is the duration and/or pattern of absence reasonable in relation to the referee's condition?
- Is the condition due to work related matters? If so, what are they, how are they impacting and how can the organisation support the resolution?
- Is the referee capable on health grounds of carrying out the duties of the post for which they are employed?

Inappropriate Questions to Ask:

- If the question has no medical standing, we cannot provide comment
- What is the diagnosis? This is confidential and usually the specific diagnosis isn't that important – what is important is the effect of the condition on work
- Can you please treat Mr XXXXX? – too vague
- What is the name of the medication the employee is taking? – this is confidential and not particularly relevant, although the effects of medication would be a useful question to ask
- Please can you solve this person's 'stress' – medical vs management issues