

How to Make a Quality Referral

University of Salford

2016

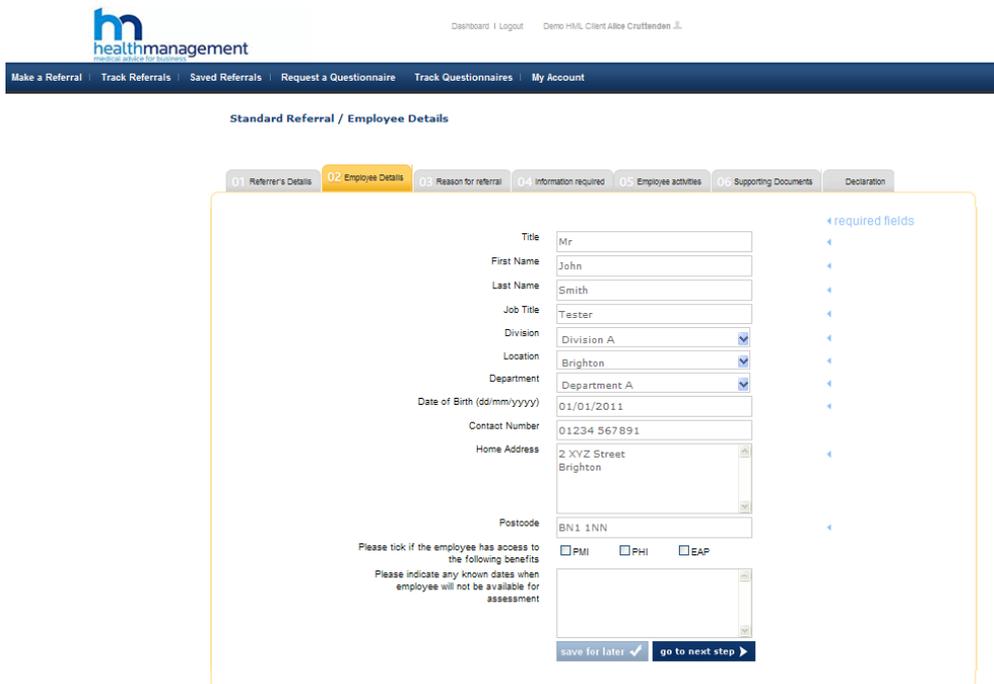


How to Make a Quality Referral

Things to consider prior to making a referral to Health Management:

- Early appropriate referral – where appropriate, early intervention will result in a swifter return to work.
- It is a clinical decision for the HML triage team as to what action is most appropriate for a case, e.g. CLCM (Clinician Led Case Management) Telephone Consultation, Independent Medical Assessment (IMA), GP Report
- The employee must be fully aware of the reasons for referral. The University incurs additional charges where HML cannot make contact with the individual or the individual fails to attend an appointment. These incurrences can be minimised by appropriate discussion with the employee prior to the referral being made.
- Please note that as you are making the referral you have the option to “save for later” at each page; this can be helpful if you are interrupted when undertaking the referral or if you have intermittent network signal and wish to save your progress after each page. You can return to a referral in progress using the “Saved Referrals” tab on the ribbon at the top of the page.

Making the Referral



healthmanagement
A MAXIMUS company

Dashboard | Logout Demo HML Client Alice Cruttenden, J.L.

Make a Referral | Track Referrals | Saved Referrals | Request a Questionnaire | Track Questionnaires | My Account

Standard Referral / Employee Details

01 Referrer's Details | 02 Employee Details | 03 Reason for referral | 04 Information required | 05 Employee activities | 06 Supporting Documents | Declaration

← required fields

Title: Mr

First Name: John

Last Name: Smith

Job Title: Tester

Division: Division A

Location: Brighton

Department: Department A

Date of Birth (dd/mm/yyyy): 01/01/2011

Contact Number: 01234 567891

Home Address: 2 XYZ Street
Brighton

Postcode: BN1 1NN

Please tick if the employee has access to the following benefits: PMI PHI EAP

Please indicate any known dates when employee will not be available for assessment

save for later ✓ | go to next step ▶

The contact number should be the employee’s **personal home or mobile telephone number**. If contact details regarding the employee are obtained from a central HR system, these should also be checked with the employee to ensure they are correct and up to date. HML use this information for

contacting employees for telephone assessments and sending advice reports so it's really important it's accurate in order to avoid delays to case progression, or breaches of the Data Protection Act.

Please advise in relation to any benefits that may be available to the employee so that we can recommend accessing these if it is appropriate e.g. Employee Assistance Programme (EAP), Counselling, Physiotherapy.

When we are arranging assessments for employees we will always work around the dates they are not available so if they have **holiday or other commitments** please let us know as this will save time and potential costs of rearrangements or late cancellations.

What information is available for you to share with HML?

The "Reason for Referral" tab is the most important information for the HML clinicians to review and understand in order that the Referrals are triaged appropriately and that assessments are thorough. The Referral Form is the only document HML is provided with, so it's important the information included is both relevant and up to date.

Standard Referral - Reason for referral

01 Referrer's Details 02 Employee Details **03 Reason for referral** 04 Information required 05 Employee activities 06 Supporting documents Declaration

All completed fields must contain at least 1 alphanumeric character. ← Required Fields

Recurrent short-term sickness absence
 Prolonged sickness and absence (give date when absence commenced and any diagnosis given)
 Fitness for work
 Fitness to attend a disciplinary hearing
 Report following an accident at work
 Job requirements will be changing/have changed
 Concerns with work performance

Other, please state

Please provide background information on the reason for referral

save for later  go to next step 

Details to consider and include as background information:

- If the individual is absent, please indicate when the absence commenced?
- Is the absence being formally or informally managed?
- Where in the organisations process is the referral being made?
- Are there any pending or recent grievances or disciplinary action?
- Are there any adjustments that have already been implemented and how have these been received?

- If there are any organisational issues, please provide a brief summary.
- If there are any performance issue, please provide a brief outline of what theses are.
- Are there any attendance issues? If so please include a copy of the sickness/absence history.
- Is there any contextual information you wish for the clinician to be aware of?

What Information do you require from the Advice Report?

Standard Referral - Information required

01 Referrer's Details 02 Employee Details 03 Reason for referral **04 Information required** 05 Employee activities 06 Supporting documents Declaration

All completed fields must contain at least 1 alphanumeric character.

- Likely date of return to work
- Is the ill health work related?
- Do any temporary or permanent restrictions apply and for how long?
- Is the case covered by disability legislation and if so, what adjustments should be considered?
- Is the employee likely to render reliable service and attendance into the future?
- Does this person have a health condition that could lead to impaired performance? If so, in what areas and for how long is it likely to continue?
- Is the employee fit to continue in their current post?
- Is the employee receiving appropriate treatment?
- What, if any, short-term adjustments could be made that would help facilitate a return to work or allow the employee to remain in work?
- Is ill health retirement relevant?

save for later  go to next step 

Consider the questions you want HML to address and tick the relevant boxes. Guidance in relation to the questions that may be appropriate in the majority of cases is provided below:

- All cases:
 - Is the ill health work related?
 - Do any temporary or permanent restrictions apply?
 - Is the case covered by disability legislation?
 - Does the person have a health condition that could lead to impaired performance?
 - What, if any, short term adjustments could be made?
 - Is the employee fit to continue in their current post?
- Long-term sickness cases:
 - Likely date of return to work?
 - Is the employee receiving appropriate treatment?
- Short-term sickness cases:
 - Is the employee likely to render reliable service and attendance into the future?

If there are any specific additional questions you wish to be covered, please include them at the point of referral not several weeks later. **The more specific your question, the more useful the advice report will be.**

Please note that there is no free text box available on this tab, however you can use the free text box in the previous tab (entitled “Reason for referral”) do ask any additional questions which are not covered in the standard list.

Activities of the Employee

What do the core duties of the employee actually involve on a day-to-day basis? Remember to give details of hours worked and shift patterns using the “Other” free text box.

Standard Referral - Employee activities

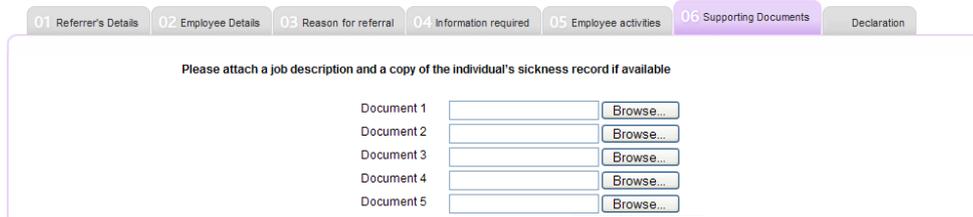
01 Referrer's Details 02 Employee Details 03 Reason for referral 04 Information required 05 Employee activities 06 Supporting documents Declaration

All completed fields must contain at least 1 alphanumeric character.

Standing	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Walking	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Climbing	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Working in confined spaces	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Vocational driving	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Driving fork lift trucks	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Driving LGV/PCVs	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Working with chemicals	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Working with biological agents	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Working with skin irritants/sensitisers	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Working with dangerous machinery	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Exposure to hazards to unborn child/pregnancy	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Exposure to night/shift work	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Perceived work place stress	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Working with dust or fumes	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Lifting or carrying heavy items	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Handling food	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Computer work/Display Screen Equipment	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Prolonged sitting	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Outside work	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Occasional overseas travel	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Noise hazard area	<input type="radio"/> Yes <input type="radio"/> Some <input type="radio"/> No
Other, please state	<input type="text"/>

Additional Information

Standard Referral / Supporting Documents



The “Supporting Documents” tab allows the referrer to include additional information; this should include a Job Description and 2-year Sickness Absence Record as well as any other relevant information that would be valuable for the clinician to review as part of the referral. It is very difficult to give advice on functional ability if the role is not understood.

The supporting documents should be **attached as PDF documents**; other formats may not be saved by the system and therefore will not form part of the referral.

If you would like further support in relation to undertaking medical referrals or in managing absence and health issues, please contact HR Advice on ext 52121.

Declaration

HML can only process a referral if the employee has been made fully aware of the reasons as well as the information disclosed. Once complete, the Referral Form is a confidential document that forms part of the employees OH file and every employee has the right to request a copy of their OH file at any point.

Standard Referral / Declaration



After the Referral

Upon submission of the Referral, you will receive regular communication from your dedicated administration team to include the following:

- A Referral Confirmation email – confirming receipt of referral
- A Triage email – confirming the next action that has been advised for the case e.g. telephone consultation/face-to-face medical assessment. Where telephone conversation is advised, the service will attempt to contact the individual 3 times before emailing you to ask you for advice in relation to further action. Please note that each time this occurs the University incurs an **additional charge of £45** and if HML do not receive a response from you within 5 days they will close the case.

- Independent Medical Assessment (IMA) Confirmation email. **Appointment details** will be confirmed with you by email and you should forward this information to the employee by email or telephone as appropriate. A copy will also be sent to the employee by post.
 - GP Email – confirming we will be writing to the employees GP OR
 - Specialist Email - confirming we will be writing to the employees Specialist
- GMC Delay email – confirming if the employee has requested to see the report prior to management
- Advice Letter – email with secure link to advice report. This will be sent to you directly and, if you have shared your cases with HR, a copy will be sent to the HR Central Services Team. You can review the Advice Letter by logging into the portal and checking the “Closed Cases” tab under the “Track Referrals” section.

If you would like any support or guidance once you have received the advice letter please contact HR on ext 52121.

For the majority of cases there will be no routine follow-up of the employee. This will only take place if there is a specific clinical reason and we will advise of this in our advice letters.

If you require new advice regarding an employee the ‘Re-refer’ option should be utilised via Track Referrals>Closed Cases. This will replicate the original referral and you can edit and update the form to reflect the new information available and what you require from HML.