

3. **What is the prognosis for this condition and what is the likely duration of the absence before the employee may be able to affect a return to their place of work?**
4. **Will the employee require any formal support to facilitate an early return to their place of work e.g. phased return?**
5. **Is there likely to be a recurrence of this condition which may have an impact on the employee's ability to meet an acceptable level of attendance as indicated in the EA Attendance Policy?**
6. **Does the nature of the medical condition meet the definition of a disability under the Disability Discrimination Order?**
7. **Are there any reasonable adjustments that may be considered by the employer?**  
  
**Please indicate whether the reasonable adjustment is likely to be short term, long term or permanent**
8. **Is there evidence of any work related factors that may be contributing to the absence?**
9. **Has the absence been precipitated by interpersonal conflict/pressures in their place of work?**
10. **Has the absence been precipitated by work demands?**
11. **Has the employee made any attempts to have these addressed by management?**
12. **Is the employee likely to remain unfit for the foreseeable future?**

The occupational health clinician will make recommendations in the written report for the employer to consider.

#### **What happens after the appointment?**

The occupational health clinician will send you a written report of the referral. You should receive this **within 5 working days** of the referral. You will be given the opportunity to ask for any factual corrections to be made and/or to include any other information that you feel the occupational health clinician may have overlooked.

#### **Who gets to see the occupational health clinician's report?**

You will have first sight of the report. After you have approved its contents a copy will be forwarded to People Services who will then write to the referring manager enclosing the report. This will normally be the 'answers to questions' as outlined above and the recommendations made by the occupational health clinician. As a confidential medical document, the referral report meets the conditions of 'sensitive personal information' as outlined within the Data Protection Act and therefore is subject to the Education Authority's policy on compliance with the Freedom of Information Act, the Data Protection Act and the Environmental Information Regulations.

#### **What if I disagree with the occupational health clinician's recommendations?**

You have the right to appeal against the occupational health clinician's recommendations. The procedure to be followed in making an appeal is outlined in the relevant Attendance Policies. People Services staff will provide you with information and guidance on how to lodge an appeal.

**And finally;** it is hoped that this leaflet will answer most of your questions. However, should you have any other matters relating to occupational health referrals which you would like advice and guidance on, please do not hesitate to contact People Services. Staff there will be only too pleased to provide whatever assistance they can.

**Contact details are:  
Telephone 028 9041 8006  
and select your local HR region or email:**

**Armagh**  
[peopleservices-armagh@eani.org.uk](mailto:peopleservices-armagh@eani.org.uk)

**Belfast**  
[peopleservices@eani.org.uk](mailto:peopleservices@eani.org.uk)

**Dundonald**  
[peopleservices- Dundonald@eani.org.uk](mailto:peopleservices- Dundonald@eani.org.uk)

**Ballymena**  
[peopleservices-ballymena@eani.org.uk](mailto:peopleservices-ballymena@eani.org.uk)

**Omagh**  
[peopleservices-omagh@eani.org](mailto:peopleservices-omagh@eani.org)

# Education Authority People Services Occupational HEALTH REFERRALS

During the course of your working career it may be necessary for you to be asked to attend for an independent medical assessment. This is called an **Occupational Health Referral**. This leaflet is designed to provide you with some information about the referral process and what this may mean for you and your employment. We have tried to address the most common questions that are asked by staff; however, it is not possible to be very specific as every case is unique. Therefore, People Services staff remain available to speak to you in **confidence** to address any concerns that you may have.

# Frequently Asked Questions

## Who has requested that I am referred to Occupational Health?

Most referrals are made by your Line Manager/School Principal/Board of Governors. If you are awaiting appointment to a post, Human Resources may ask that you are referred for a 'pre-employment health assessment'. Some referrals are made by the individual member of staff and these are known as 'self-referrals'.

## Why have I been referred to Occupational Health?

The most fundamental reason for a referral is to establish your medical fitness for the job that you are employed or are about to be employed to do. The referral may have been prompted by a period of absence(s) from work due to ill-health and a 'trigger point' as defined by any of the agreed Attendance Management Policies and Procedures. These are:

### Teaching Staff

- Absences related to stress.
- Absences of more than 6 casual days in a 12 month rolling period.
- Continuous absences of 4 weeks or more. (*Teacher Attendance procedure TNC 2008/2*)

### Administrative and Support Staff

- Absences related to stress.
- More than 8 casual days absence in a 12 month rolling period.
- More than 3 periods of absence in a 12 month rolling period, each in excess of 3 days duration.
- Continuous absence of 4 weeks or more.
- An individual officer with an absence rate of 5% or more.

**(Attendance Policy & Procedure for Education Authority Employees (other than School Based Staff); Managing Attendance at Work - Staff in Controlled Schools with Fully Delegated Budgets)**

## Is my employer entitled to ask me to attend an occupational health referral?

Under Health & Safety at Work and Disability Discrimination legislation, the employer is required to exercise a 'duty of care' to ensure that you have a 'safe system and place of work' and to undertake any 'risk assessments' as appropriate. It is also an employer's duty to consider any 'reasonable adjustments' in cases where a disability has been indicated in order to enable an employee with a disability to work to their full potential.

You also have a **contractual responsibility** to fulfil the terms and conditions of your contract of employment by providing good attendance and alerting your employer if there are any difficulties which may be preventing you from performing your duties.

## Who carries out the occupational health referral?

The referrals are conducted by Occupational Health Clinicians who are not employed by the Education Authority but who have been contracted to provide this service. The occupational health clinicians are medical specialists, usually at consultant level, who are qualified in the discipline of Occupational Health. People Services staff can provide you with details of the occupational health clinicians who are currently contracted by the Education Authority.

## Where does the occupational health referral take place?

The referrals are normally conducted at your local Education Authority or in an office close to your local Education Authority. If you have any special requirements, you should notify People Services staff in order that these may be taken into account.

In some circumstances, it may be necessary for the referral to take place in the occupational health providers' own office or by telephone consultation. Your appointment letter/email will give the address and details of the relevant premises.

## How long does the appointment last and will I be physically examined?

An appointment will usually last around 40 minutes. You will not normally be physically examined although a non-intrusive physical examination may take place if the occupational health clinician considers that the circumstances require this. You will be asked to provide your consent before any physical examination is carried out.

## Can I bring someone along with me to the referral?

You should treat this appointment in the same way that you would a normal medical appointment with your own medical advisors. Therefore, it is permissible to bring along a family member or friend to support you during the referral. It is also possible to bring your own medical advisor such as your GP or a specialist consultant to the referral; however any costs associated with this will be your own responsibility.

## What information will be provided to the Occupational Health Clinician and what will I be asked at the referral?

The occupational health clinician will be provided with a copy of the referral request document which your Line Manager/Principal/Board of Governors completed. This document and any additional associated information should already have been discussed with you by your referring manager prior to the request being made to People Services. A copy of your sickness absence history and job description will also be provided.

At the outset of the appointment, the occupational health clinician will ask you to complete a written consent form giving your permission for the referral to proceed and a written report to be made.

At the referral, the occupational health clinician is required to address a standard list of questions. These are:

1. **Has the employee a recognisable medical condition?**
2. **Has the amount of time absent from their place of work been commensurate with this condition?**