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## Changes to the Occupational Health Referral Form

### Frequently Asked Questions

The current “HE1” referral form is being replaced with a Management Referral Form from October 2016. Below is a list of Frequently Asked Questions to assist employees and managers with this change.

#### Frequently Asked Questions

##### 1. Why is the form being changed?

The current “HE1” form has been in use since 2008. As part of a service improvement initiative it was decided to review the current documentation, by meeting with services users and benchmarking with other UK Occupational Health providers.

##### 2. Why is the form now called a Management Referral Form?

The term “HE1” is unique to Cardiff and Vale UHB and originally meant Health Evaluation form version 1. To avoid confusion to new employees joining Cardiff and Vale UHB the name of the form is now standardised.

##### 3. There is no longer a section for the employee to sign to give consent, does that mean the referral can be sent without their consent and /or knowledge?

No, the purpose of and the contents of the referral must always be discussed with your employee prior to sending to Occupational Health. By checking the relevant box the referring manager is confirming this has been done.

At the time of the consultation in Occupational Health the contents of the referral will be discussed with the employee. If it is found that the employee has not been informed of the referral purpose then the consultation may be stopped and the manager, and with the employee’s consent, Human Resources will be notified of the reason for the delay. The manager will then be required to discuss the contents of the referral with the employees and resubmit the referral once this has been done. Only then will the consultation proceed.

##### 4. As the form is now electronic, what happens if I do not have access to a computer when I meet with the employee?

The form is designed so that it can be completed both electronically and in a paper format.

If you do not have access to a computer at the time of the discussion with the employee you can print a copy and either send the completed paper copy to Occupational Health or transfer the details of the referral to the electronic version when you have access to a computer.

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##### **5. Does every section need to be completed?**

Yes. Parts 1, 7 & 8 must be completed as a minimum in order for the referral to be processed. To ensure that both you and your employee get the most out of the referral and the resultant report, it is strongly recommended that as much information as possible is included in the referral.

If an electronic version of the Occupational Health report is required it is essential that the manager's NHS Wales email address is included. Please note electronic reports will not be sent to any non NHS Wales email addresses.

##### **6. Part 6 has a list of specific Questions; can all of them be selected?**

The list of specific questions has been developed after benchmarking with a number of Occupational Health services and reviewing the questions most commonly asked currently.

It is not intended that managers will use all of the questions, but only those that are relevant to the situation and that will assist them in managing and supporting their employee.

##### **7. Can additional questions be added later without informing the Employee?**

Additional questions and information will only be included into the consultation process if it is confirmed by the manager that the employee has been made aware of the information prior to sending it to Occupational Health

##### **8. How do I send the form to Occupational Health?**

The preferred option is to send an electronic copy to the Occupational Health email address – see below. Alternatively you can send a paper copy to Occupational Health via internal mail

##### **9. Where to get further Information**

If the above information does not answer your questions, please contact the Occupational Health Service on:

UHW 02920743264 (43264)

UHL 02920715140 (5140)

[Occupational.health3@wales.nhs.uk](mailto:Occupational.health3@wales.nhs.uk)

Or your designated HR team