

AN INTRODUCTION TO THE ROLE OF OCCUPATIONAL HEALTH FOR MANAGERS

What is occupational health?

Occupational health is about the effect of work on health, and the effect of health on work. It plays a vital role in helping employers care for and understand the needs of their employees, enabling businesses to reduce sickness absence levels and optimise staff performance and productivity. Occupational health practitioners are impartial and their advice benefits both employer and employee.

Occupational health practitioners will see employees on a case-by-case basis to give advice to managers, in what are often referred to as management referral clinics. They will advise managers on any type of health condition in the workplace, including mental health problems and alcohol or substance abuse problems. They also undertake health surveillance, in which employees exposed to specific workplace hazards (such as chemicals or noise) are seen periodically to detect early signs of a work-related health condition. Occupational health practitioners can assist managers in undertaking risk assessments, either generically for a particular workplace operation or for a specific employee with a disability or health condition. Some doctors will be especially appointed by the Health and Safety Executive to medically supervise certain types of worker (e.g. those working with radiation, lead or asbestos).

At Premier we have three types of practitioner that see employees, depending on the purpose of the consultation. These are the doctor, the nurse and the technician. Doctors and nurses will be involved in giving advice to managers, whereas the technicians undertake medical screening tests, such as vision or hearing tests.

How occupational health can help line managers

Most line managers seek occupational health advice either because a member of staff is absent through ill health, or because concerns exist about a person's fitness for work. In these cases, providing the employee agrees, a referral can be made for occupational health advice. This is called a management referral. Our doctor or nurse will see the employee in their clinic, and write a report to the manager (or sometimes to the HR manager, depending on your company's policy).

How will an occupational health report help the manager?

Reports will usually focus on addressing the specific questions that you have asked in your referral. At Premier, we have a standard referral form which lists a number of commonly asked questions, and you can select from this list. Alternatively you can add your own questions. The following is an example of questions that occupational health can address for you:

- What is the cause of the individual's absence?
- What is preventing the individual returning to work?



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- Is the employee fit to undertake their current role?
- What (reasonable) support can we put in place to facilitate an early return and/or rehabilitation?
- Is performance significantly affected by ill health and how long is this likely to continue?
- Is the ill health work related?
- Does the Disability Discrimination Act apply?

In cases of prolonged sickness absence, you will need to understand how the employee's health will progress in the future:

- Can we expect the individual to return to work in the foreseeable future? If so, when?
- Is the employee likely to render reliable service in the future?
- If the individual is not fit to return, is ill health retirement appropriate?

Sometimes you may have specific questions, for example relating to a particular work activity. Premier's referral form allows you to add your own specific questions, for example:

- Can the employee safely undertake certain physical activities, given their health condition?
- Will working in certain locations or environments worsen their health condition?
- Is the employee taking any medication that might have safety implications for certain work tasks (for example, driving)?
- Does an employee's health condition have implications for shift work?

In some cases, advice might be limited if the occupational health practitioner has an incomplete understanding of an employee's health situation, and they may recommend obtaining a report from the employee's treating doctor.

What steps does the manager need to take if they feel a management referral would be helpful?

Line managers can seek advice from their HR colleagues as to whether an occupational health referral is likely to be appropriate. Alternatively, a telephone conversation with a Premier doctor or nurse may be helpful, as this can help you decide what questions to ask, as well as ensuring you have realistic expectations about the advice you are likely to receive.

Normally, it is strongly desirable for the manager to discuss the occupational health referral with the employee first, including the manager's reasons for concern. We can only assess an employee if they provide written consent, and so obtaining their support for the referral is critical. This openness also helps to prevent employees from harbouring suspicions about the motives behind a referral.



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When will occupational health practitioners write to the employee's treating doctor?

In most cases, we can obtain a good understanding of an individual's health problem and their medical management from the information they provide at the consultation. Where this is not the case, we may advise that a GP or specialist report is indicated. Written consent is needed from the employee to do this, and they have the right in law to view any report before it is sent to us.

We may also need to obtain a report in cases where the medical condition is very specialised and specialist advice is needed to inform the advice that we give.

The principles of confidentiality that all doctors and nurses abide by mean that we will only obtain confidential medical information about employees from their doctors where there is a clear need, to inform our advice on fitness for work. In addition, our doctors are very experienced in recognising those cases in which a GP or specialist report is likely to be helpful. In cases of ill health retirement, specialist reports will frequently be needed.

When is a review appointment helpful?

In some cases, the occupational health practitioner will advise a review appointment after a certain period of time (often 4 to 8 weeks). This can allow the practitioner to gauge the progress of a person's health condition, thus allowing them to give a clearer indication on timescales for recovery. It can also be a useful opportunity to review a person's treatment, in case things are not progressing, or to review the ongoing need for adjustments.

The limits of occupational health advice.

It is helpful to consider three important points about your occupational health service:

- The role of occupational health is purely an advisory role.
- Occupational health practitioners limit their advice to the health aspects only.
- Impartiality is critical to the success of the occupational health role.

Occupational health is an advisory role

In practice this means that occupational health cannot make management decisions. A common area of confusion is that of workplace adjustments. The law requires employers to make reasonable adjustments for those with health problems, in certain cases. It is the role of occupational health to advise on which adjustments might be appropriate (based on their understanding of the medical facts), but not to determine if



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those adjustments are reasonable. This is because the decision as to whether a particular adjustment is reasonable depends on organisational factors that only the employer can judge (for example, how the adjustment will impact on the business). Examples of questions that occupational health will not be able to answer, therefore, are as follows.

- 'Please advise if the adjustments are reasonable.' (*We can advise on appropriate adjustments, but not their reasonableness.*)
- 'Should this employee's contract be terminated on medical grounds?' (*We can advise that an employee is unlikely to be fit to return to work for at least six months for example, but we can't advise you to terminate their contract.*)
- 'What is an acceptable level of sickness absence for this employee?' (*We can advise if there is an underlying health reason for high levels of sickness absence, if this is likely to continue and we can often give an indication as to how high the levels might be, but your company needs to decide what level of sickness absence is reasonable.*)

Occupational health practitioners limit their advice to the health aspects

Occupational health will not be able to give advice on non-health matters, such as conduct or behaviour in the workplace, other than to advise on whether or not there might be a health problem affecting the person's conduct or behaviour.

Impartiality of occupational health – disputes and disciplinarys

Occupational health practitioners must maintain uncompromising standards of impartiality. The occupational health role only functions if the practitioner has the confidence of both parties, employer and employee. In practice, limiting our advice to the health aspects is how we achieve our impartiality. Areas that can cause difficulties include disciplinary processes and allegations of wrong doing (on either side).

There is an understandable tendency for both sides, often without realising it, to try to draw support from the occupational health practitioner. By resisting this, however, your occupational health practitioner can continue to engage with both employee and management, ensuring that health issues are addressed, and they can often provide effective mediation to help progress such cases.

In addition, we can advise on fitness to attend disciplinary hearings, and we may be able to advise if there is an underlying health condition that could have contributed to a certain pattern of behaviour. Specific questions about health and the effects of illness can be answered, but questions asking for an opinion on conduct or blame cannot. If you have a specific question, you could speak to a doctor on the telephone to ensure you ask appropriate questions that they will be able to answer.

Impartiality of occupational health – are we taking the employee's side?



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Sometimes managers feel that the occupational health report is taking the side of the employee. This should not be the case, as we are committed to impartiality. However, it has to be remembered that the practitioner will spend a reasonable period of time having a face to face consultation with the employee, and it is unavoidable that most of the information they base their reports on must come from the employee. This is particularly the case if the practitioner has not spoken to the manager beforehand or if the management referral form provides few details. If you feel that a report is taking the side of the employee, contact us, to discuss the report with the practitioner. It is also important to ensure you put as much detail as possible in the management referral form, and if you feel a case is complex, speak to the practitioner about it first.

Where to get more information

At Premier we believe that an effective occupational health service is built on relationships, and it is by speaking to managers that we are able to learn about the work culture, and indeed the unique pressures and demands, that shape your organisation. For more information or specific advice on how to proceed with a referral, you can either contact your HR department, or contact us directly at Premier, and our staff will arrange for a doctor or nurse to call you.

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