Effective Referrals

7 tips for making effective Management Referrals

LATUS

Good health is good business...

Introduction

Ever been frustrated by the quality of the occupational health reports you receive from your OH provider?

Here are 7 simple tips to make sure that you are making great management referrals, so that you can expect fantastic reports back from your occupational health team... NO EXCUSES!

NO EXCUSES?

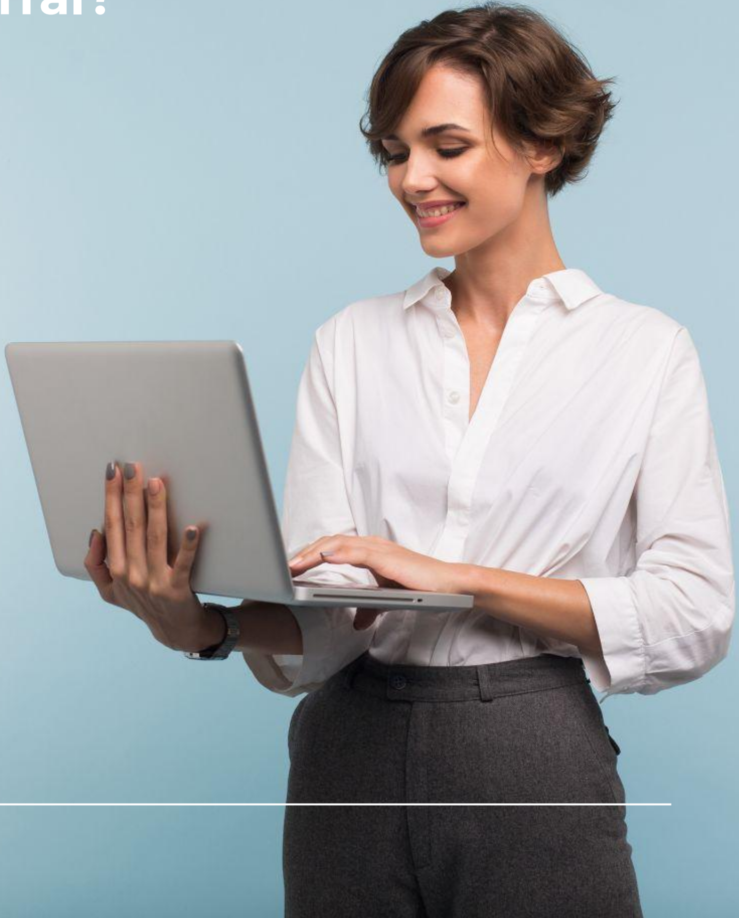
The easiest response to a manager questioning the quality of a report is to say 'you didn't provide enough detail in the referral.' Or 'I wasn't sure what information you were looking to gain from the appointment.' It's difficult to argue with this response, if your referral lacks detail and specifics.

So, follow these 7 tips to make sure you never have to worry about hearing these excuses again!

Tip 1 – Is it appropriate to make a referral?

The first things to consider are:

- Is it the right time to make a referral?
- Is the employee in the right state to attend a referral?
- Will the employee and company benefit from medical advice/information at this stage?
- Is all of the information required for the appointment available?



Tip 1 – Is it appropriate to make a referral? (continued)

These may seem like obvious questions to ask before submitting the referral, but not having a clear answer to these can often be the downfall before the referral has even begun.

Answering these 4 questions will give you a good gauge as to whether a referral is appropriate. Liaise with the employee to make sure that they have all the information required for the appointment and that they are not waiting on results, or reports from their GP or specialist.

For example, if the employee is waiting for some scan results relating to a musculoskeletal injury, then it would be wise to wait until the results have been received until the appointment can go ahead. This will avoid you getting that ever-frustrating comment on the report of, 'I will be able to advise on this once the scan results have been provided.'

This takes us nicely into tip 2 which is also down to timing...

Tip 2 – Involve Occupational Health as early as possible

At first this tip probably sounds contradictory to Tip 1, however, the point of this tip is to refer employees to Occupational Health as soon as possible. This is the number 1 way to reduce absence rates. If occupational health are involved early, it is likely that employees can be helped to return to work early. It also ensures that they receive the support they require from the start of their illness/injury, and in some cases be prevented from missing work altogether as the occupational health team may give some simple advice on adjustments to help keep them at work.

Occupational health cannot overrule a GP, so that is why it pays to refer to occupational health early. A GP will not be able to suggest adjustments to an employee's role to help keep them working safely, so instead will likely just sign them off work for a period of time. At this point, occupational health will only be able to give advice for the best course of action for when the sick note expires.

Tip 3 – Actually submit a referral

Many companies make the mistake of not actually submitting a referral form as part of the referral process.

If you have good lines of communication with occupational health this may not seem necessary, however, it is still essential that you complete a referral form to submit to the OH nurse/doctor with all the necessary information. This will give the clinician a point of reference during the appointment to make sure they cover all the points you have requested. It also creates trust through transparency with the employee, as they will have seen what information you are requesting before consenting to the referral.

Submitting a referral form is also good clinical practice, as it creates proof of written consent, and that all appropriate channels have been adhered to.

Tip 4 – Complete all the details

This tip may sound like a teacher telling a student to make sure they input their name and details correctly at the top of an exam, but sometimes it is the simple things that make all the difference.

To start with ensure that you have completed all of the employee details correctly, so that the OH team can contact the employee, and provide them with a copy of the report. Make sure that the referring manager details are completed correctly so that the clinician can ensure the report is returned promptly to the right person. Finally, make sure you have completed each section on the form giving information on the case, absence history, job role and what information you would like in the report etc.

Tip 5 – Ask specific questions

If you are only going to take one of these tips on board, make it this one! If you ask vague questions, you will likely receive a vague report back. Therefore, be specific with the questions you ask on the referral form and you are likely to receive a useful report, with advice specific to the case.

On your referral form, there should be some standard questions to save time. Use these questions,, but also use the 'any further questions' box to ask more specific questions to your referral. This will ensure that the report gives you advice specific to the employee and the questions you have regarding their case.

Tip 6 – Give as much background as possible

The more background information you can give your OH team regarding the referral, the more appropriate the nurse/doctor can be with the questions they ask the employee during the appointment. **The nurse/doctor is likely to be using a biopsychosocial model to evaluate the employee during the appointment** and therefore, all factors which could influence the clinicians understanding of the employee’s situation are important.

So, if possible, provide:

- Job description
- GP reports
- Accident reports
- Previous OH reports
- What activities the employee is able to do
- Historical absence stats

Tip 7 – Speak to the nurse

In our experience we have found that this tip has the biggest influence on the quality of the reports you will receive.

Regardless of the detail you put into a written referral, nothing gets your information over to a clinician as well as a conversation.

This can be done face-to-face or via telephone. Having a conversation about the case also allows you to give your view of events, to prevent you receiving a completely 'employee-sided' report which is just recounts the case according to their perspective.

Tip 7 – Speak to the nurse

A pre-appointment conversation is **your opportunity to add detail or clarification to any of the questions you have asked on the referral, or any of the information you have tried to explain.** This is a step we have introduced at Latus Health for more complicated referrals and **it has resulted in a much more effective management referral service for our clients.** We would strongly advise that you look to introduce this with your occupational health team, and see if you get the same benefits as our clients.