How to Create a Management Referral

A Management Referral is made when a Manager wishes to refer an employee to People Asset Management (PAM) due to Long Term Sickness Absence, Short Term Sickness Absence, or Review of an employee at work but not doing the job they are employed to do because of a health reason, or a Review as part of a continuing assessment plan.

The aim is to provide advice regarding the likely duration of sickness absence; the functional effects of any ill health on the employee’s work, how their health affects their ability to work, and suggested rehabilitation approaches back into the workplace where appropriate.

To create a referral select NEW Management Referral from the Home Page

Search for the employee by typing their surname and press Search

Click the “Select” link in the “Action” column of the required employee

You are presented with the details of the selected employee.

Press “Continue” if the displayed employee record is correct.
Fill out the online referral form:

On this page
- you have the ability to confirm the employee’s details are correct
- make amendments if necessary
- confirm who is the manager making the referral

Step 2.1 About the Employee
- Confirm the employee has been advised about the referral, there is an explanatory document that you can give them
- Give details of whether the employee is a shift worker, in work, not in work or whether any adjustments can be made to accommodate them
- Indicate the first date of illness and first date of absence.

Click “Continue” when all sections are completed.

Tip: Fields marked with * are mandatory
Step 2.2 About the Referral

Indicate the main reason why you are referring them adding any additional comments in the box below.

We actively encourage you to discuss referrals with our clinicians.

Please select service required. This will normally be a management referral; the OH team will triage this

Tell us the best phone number to contact you on

At each Step there is a Handy Tips icon to help you.

Step 2.3 About the Referral
Your cost centre must be entered as the Customer Order Reference

The referral is now complete, you must press submit.

You will also receive an e-mail confirming your referral has been submitted.
From here you can either: book an appointment, create another referral or go to the referral list.

NB you will receive an e-mail confirming the date, time and venue for the OH appointment. You must make the staff member aware of this. If they are unable to attend the e-mail should explain how they can go about arranging an alternative appointment.

The OH report that follows from the appointment will also only be sent to you (the Manager) and you should forward this on to your staff member and arrange a meeting to discuss this, sometimes a letter may need to be sent with this. If you have any questions about the report please contact Occupational Health.