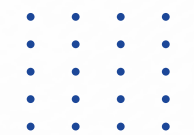




How to manage a referral to
Occupational Health for a new
starter

HR Case Study



P3 People Management



Client Overview

Sector: Professional Services

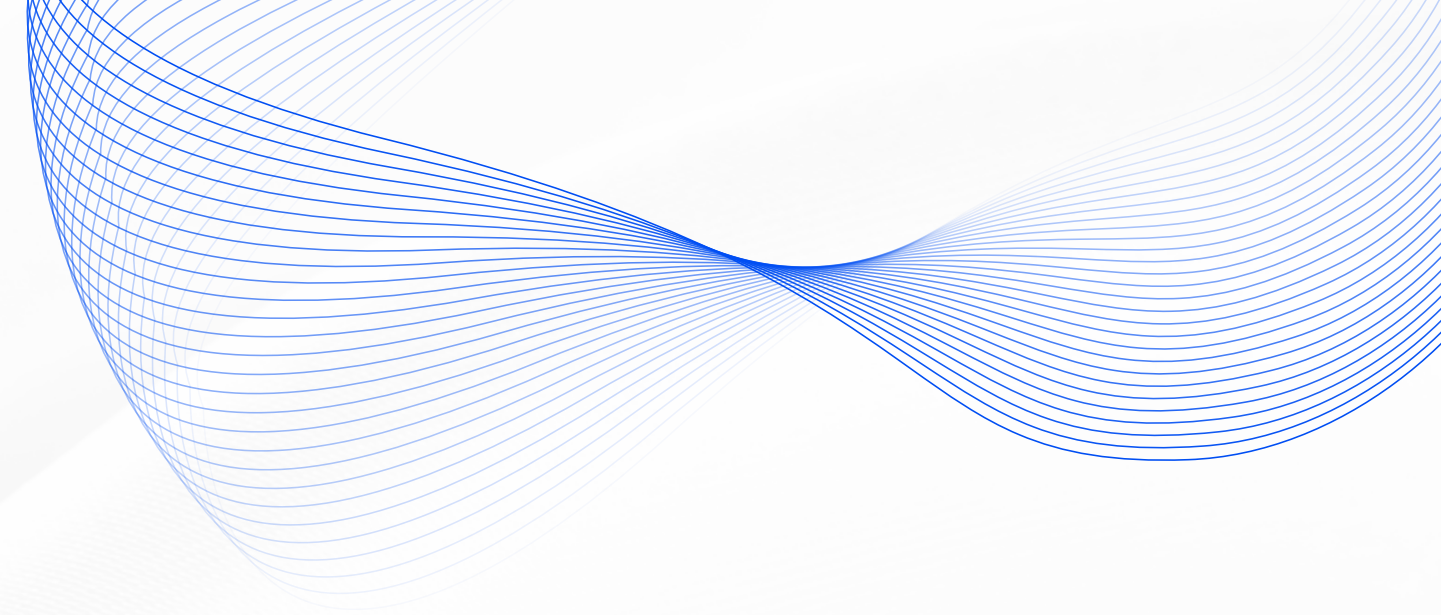
Size: 45 employees (additional locations in America and India)

HR Setup: HR Director in the US and Operations Director responsible for HR in the UK

Key Employment Context: Company focused on transforming companies' culture through recognition. Looking to lead by example.



The Challenge



- Company introduced New Starter Questionnaire's (NSQ), to be completed by an Occupational Health provider.
- During the transition to the use of NSQ's, the Company offered a role to an applicant when NSQ was not positioned at this time
- One month into employment, new starter had time off for a serious health concern, not declared during onboarding
- Health condition would be considered a disability and therefore high risk of discrimination issues and wellbeing concerns
- Health condition would require input from Occupational Health



Our Approach

Initial Assessment:



- Review onboarding documents for any medical condition declared
- Understand reasons for absence
- Perform a return-to-work discussion
- Understand why the condition wasn't declared at onboarding
- Review documentation provided by employee e.g., hospital discharge letters/consultant reports
- Discuss any adjustments with the employee
- Prepare or provide a copy of the job description
- Perform an NSQ via Occupational Health





Our Approach

Advice & Guidance



- Outlined clear questions/discussion points for the manager to better understand personal challenges for the employee
- Reviewed responses and discussed with the manager
- Requested copy of job descriptions and risks associated with the role
- Helped manager to position NSQ with employee by providing discussion points
- NSQ submitted to Occupational Health
- Discussed process with manager and provided clear possible outcomes
- Once NSQ back, this advised that the condition was too complex and needed to be referred to Occupational Health
- Discussed benefits with manager and discussed interim adjustments / any concerns manager had with ability to perform the role, or time out of the business
- Prepared Occupational Health assessment for managers' review
- Submitted Occupational Health referral
- Once report back, outlined clear questions/discussion points for the manager to discuss outcome of the Occupational Health referral with the employee
- Coached the manager on how to have the conversation
- Provided summary letter for manager to provide to employee confirming any amends to adjustments on the back of the referral report
- Followed up with the manager for monitoring and any adjustments not working / needing to be reviewed

Outcome & Impact



- Implemented NSQs for all new starters going forward and filled any gaps (3 months service or less)
- Supported the managers understanding of the employee's boundaries e.g., limited travel and maintained a safe working environment for the employee
- Avoided risks of employee grievance or claims (such as disability discrimination, injury at work) by not exploring condition and support first
- Helped the manager to support employee engagement and in turn support Company reputation by leading by example to their clients





Lessons & Next Steps

What the client learnt about their own people management approach:

- **The benefits of using NSQs within the onboarding process**
- **Reinforced benefits available to employees e.g., use of health cash plans and EAP services**
- **Supported managers understanding and their development**
- **Support employee engagement**





What would have happened without our support?

- Risk of discrimination claims
- Damage to culture i.e., employee wellbeing and engagement
- Damage to reputation should the employee have left the business

Consultant's Note

It's easy to jump to conclusions. The Company were frustrated that the employee hadn't reported their medical condition upon onboarding, and that they had a two-week sickness absence within one month of starting. Whilst this is valid, by asking good questions, the Company were able to understand the employee's drivers for this. That being, they had a bad experience in the past where they were not supported, and their medical condition was not considered by their previous employer, leading to poor treatment of the employee. By getting medical input into the condition and not making assumptions, the Company were able to implement some really easy adjustments and the new starter is thriving!





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