

Healthywork Ltd – Referral Process for various assessments:
Complex Ergonomic, Mental Health/Neurodiversity, Functional Capacity (FCE) and Cognitive Assessment

Steps – After you have received the Quotation document, T&C 2023 & Referral form & Consent Form (1), etc.	Yes?
1. Referrer (usually OH/HR) issues Consent Form (1) to be completed by Employee/Individual Client & returned to Referrer.	
2. Referrer completes the Referral form (ideally with input/shares it with the Employee and sends to HW Alison Biggs (AB) along with supporting documents (including Consent form (1), Job Description/work tasks list, Performance reviews (if applicable) any other relevant work and as available health letters/reports info. Physical Questionnaire for FCE if have a job or Cognitive Questionnaire if Cognitive Assessment). (If a Purchase Order Number is required by the Referrer this is sent to HW AB - needs flexibility of PO value as the final input is unknown (or N/A)). Referrer: Ensure the named recipient for the Confidential Occupational Health Report will be the appropriate person. This is usually HR and/or OH, when an organisation has those departments. Otherwise, the report may go to the CEO or Managing Director, or a person designated as performing HR duties for the organisation. Inform and agree with the Employee/individual client who this will be.	
3. HW AB will review the Referral documents provided, to establish all are present to proceed and inform the Referrer of the name of the HW Assessor, if other than AB. (Please indicate if you prefer HW AB to be the assessor). (HW begins a time sheet of input delivered for the case - 1-2 hours prep input). **If writing to the GP for 'medical notes', this will require extra input: Indication of the requirement to include this stage with the Referrer and Employee. Produce an email letter to the GP, coping in the Referrer and the Employee). Awaiting the GP notes (4-6 weeks) and reading the notes and including additional information in the report (between 2 – 4 hours input)**	
4. The HW Assessor will contact the Employee (usually by email) to schedule at a convenient date and time for the assessment. Set up video call or establish F2F location.	
5. HW Assessor informs the Referrer on email of the proposed date and time.	
6. HW Assessor issues Consent Form (2) as applicable for the specific type of assessment (Ergonomic, Mental health, FCE or Cognitive Assessment) - to the Employee prior to the assessment date, which details assessment process, content, report process etc. Video call assessments (mental health/neurodiversity Assessments): It may be signed and returned (by email), or if the individual goes ahead with the call and may not get to return the form signed, as they have already signed Consent form (1) if they go ahead with the call, this is acceptable. (Mental Health and/or Ergonomic assessments) F2F assessments When F2F, (some Mental Health and Ergonomic, but all FCE's and Cognitive Assessments): It will be signed at the beginning of the assessment. (30 minutes - 1 hour input for steps 4-6 above).	
7. Employee and HW Assessor complete the assessment. (Typically between 2-4 hours duration).	
8. After the assessment: HW Assessor will inform the Referrer and Employee (copied in) regarding the timing of the completed assessment, any other relevant info and the planned date for the Employee to review the report and the subsequent planned date for submission to the Referrer. HW Assessor will send to the Employee any immediate relevant health information they may benefit from (e.g. Crisis Support info sheet etc). (Approx 30 minutes - 1 hour input for various emails, research into local support services etc).	
9. Read report review process: Once the Draft report (with password) has been completed by HW Assessor (4-5 days post assessment date) - The Employee reviews it to ensure accuracy (sent via email to read on a suitable sized screen electronic device – or print off/post) and they are comfortable with the way the info is detailed, back and forth, as required (4-5 days typically to complete the review process, depending availability around other work tasks). (Report production – 5-6 hours input and between 30 minutes-1.5 hours input for Review stage).	
10. HW AB issues Final report (with password) directly to Referrer on set submission date (typically 8-10 days after the assessment date, unless an extension is arranged for whatever reason), along with the professional time spent on the case to date any other costs (F2F meeting room, travel etc). (Approx 15-30 minutes final review/Submission stage).	
11. Referrer will review the report and can request a follow up/discussion session about the report, via HW AB, if required, within 5 working days, which would be subject to the quoted time charge/hour.	
12. HW AB will issue an invoice when informed by the Referrer that no further input is required or a few days after the submission date (e.g. after 5 working days), assuming there to be no further input/discussion required at this stage.	