

## Guidance on Referral Details sent to Occupational Health regarding Postgraduate Doctors and Dentists in training (PGDITs)

This guidance is for anyone who refers a PGDIT to occupational health.

This includes the following.

- Professional Support & Wellbeing at HEE
- Educational Supervisors
- Clinical Supervisors
- Training Programme Directors
- College Tutors & Regional Advisers
- Other professionals in a supervisory or educational role

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### Introduction

Referrals from anyone in a supervisory role requesting occupational health advice are generally for one, or more of three reasons;

1. **Performance** in a trainee, ARCP outcomes, WBA entries, SLEs, e-portfolio entries, professional examinations and clinical performance with care of patients.
2. **Absence** of the trainee for an extended period, or repeated unpredictable sickness.
3. **Behaviour** which is unacceptable to patients, colleagues, managers, or external events. (eg alcohol or drug problems which may need advice on fitness to practice.)

This guidance document is to help you ask the best questions about a PGDIT which will assist you in helping the trainee. The exact questions you ask of occupational health are to a certain extent dependent upon the reason(s) for the referral.

### Where reasonable adjustments are likely to be explored and advised

It is the *dual responsibility* of the NHS employer [training service delivery environment) and the training programme (TPD and HoS) who have the responsibility to deem what is reasonable to be accepted as an adjustment for the purposes of safe decision making linked to patient outcomes with improving continuous learning outcomes mapped against the stage of learning e.g., ST1-6.

### Referral Information

There are two sets of information which are required in a referral.

- 1) Essential Information for all referrals
- 2) Information & details specific to the circumstances of the trainee referral.

#### 1) Essential Details for All referrals

##### PGDIT details

- Name:
- Date of Birth:
- Address:
- Phone number: (Mobile & landline)
- Email addresses: **preferably Active NHS email** rather than non NHS address. It is more secure to send personal letters to NHS email addresses.
- Speciality: (state which) Foundation 1 or 2, or General Practice
- Stage in Training, FY1 or 2, ST level, Full time or Less than Full time programme.
- Educational Supervisor and Training Programme Director

### **Information about performance**

- Latest ARCP: Outcome and date.
- E portfolio (up to date?)
- WBAs, SLEs,
- Professional Examinations: Part1, Part2, etc. Number of attempts and outcomes.
- Any support in progress via the PSW service if applicable

## **2) Information & details specific to the circumstances of the trainee referral**

You can give a descriptive free text summary outlining the concerns about the trainee, with details of what has been observed and what your concerns are. This is very important for any concerns about behaviour. (Suggestion is one to two paragraphs.)

Questions you can consider to put to occupational health are suggested below, and not all questions are relevant to every trainee's situation.

- Is X fit for his/her role?  
If not fit, can you give an estimate of the likely duration of this situation?
- Is X medically suitable to engage with, and be assessed, in training?  
If not fit, can you give an estimate of the likely duration of this situation?
- Are there any factors at work, or in the training environment affecting X's health?
- Are there any adjustments advised to X's role to help undertake his/her work or training?  
(The Occupational Physician should list adjustments in the reply, if possible.)
- Is there any other relevant information or advice which help the current situation with regard to work and learning?

### **For PGDITs who have or have had absence:**

If repeated short term, unpredictable absences;

- Is there an underlying medical condition responsible for the pattern of absences?
- What is the likely long term outlook for the pattern of absences?

If long term absence;

- What is the likely duration of the absence?
- Are there any adjustments which can help trainee return to work &/or training in a planned return to work programme?

### **Where there are performance difficulties;**

- Are there, or have there been, any health conditions affecting performance?
- If so, what is the estimated time that training, or performance has been, or is likely to be affected?

### **Where there are behavioural concerns;**

It is important that there are descriptions of the behaviour and the situations where these are observed.

- Is there a medical condition which could be responsible for the observed behaviour described?

All educator referrals should have the PSW team cc'd into the referral [psw.em@hee.nhs.uk](mailto:psw.em@hee.nhs.uk) (or educators should forward the referral onto the PSW for onward dissemination). This is because the OH service is procured through the PSW and also allows the PSW to be privy to any background information for any cases that eventually come their way that have become complex such as safeguarding risks.