



Scottish Information
Commissioner

Paper: Introducing an Occupational Health Self-Referral Process

Meeting date: MSTM 16 April 2026

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1. Summary

This paper outlines a proposal for the introduction of an Occupational Health (OH) self-referral process, developed in response to a recent audit recommendation. The proposed process allows staff to refer themselves for OH support without waiting for a manager referral, providing a streamlined and accessible pathway to requesting OH support, while remaining fully managed in house. Importantly, the process is immaterial to the external supplier in place. The proposed approach enables the organisation to take into account individual need, consider alternative arrangements where appropriate, and manage costs associated with referrals. Implementing this process is expected to benefit both the organisation and its staff by promoting timely access to support, improving wellbeing, and enhancing workforce resilience.

2. Proposal

Draft Occupational Health Support: Self-Referral Process

Purpose

This process allows employees to seek support for their health and wellbeing at work without needing to wait for a manager to initiate a referral for an occupational health (OH) appointment.

When to Use Self-Referral

Employees may choose to self-refer if they:

- Have a physical or mental health concern that may be impacting their work
- Would like to discuss possible workplace adjustments
- Are returning from absence and would like support
- Have concerns about how work is affecting their wellbeing

Step 1: Submit a Self-Referral Request for an Occupational Health Appointment

Employees can self-refer by contacting the Head of Business Support directly. This should include:

- A brief outline of the reason for the request
- Any specific concerns or support they feel may help

Step 2: Acknowledgement

The Head of Business Support will acknowledge the request and outline the next steps which may or may not be a direct OH referral.

Step 3: Initial Discussion

A confidential conversation will be arranged between the employee and the Head of Business Support to:

- Understand the employee's situation
- Discuss any challenges they are experiencing
- Explore potential requests for support or adjustments which may or may not require a direct OH referral should an alternative option be possible

Following the discussion, next steps may include:

- Guidance on managing workload or responsibilities in consultation with the line manager
- Signposting to external support where appropriate, including Occupational Health.
- A formal OH referral

Step 5: Involving the Line Manager

Where workplace adjustments or changes are needed, the line manager will need to be involved.

Confidentiality

Self-referrals will be handled sensitively and confidentially. Information will only be shared with others (e.g. line managers) where necessary and with the employee's awareness.

Additional Support

Employees are always encouraged to speak to their line manager where they feel comfortable doing so, but this is not required in order to access support through this process.

3. Recommended Next Steps

- 1) SMT considers the contents of this paper and agrees to proceed
- 2) The new process is communicated to staff
- 3) The new process is included in the employee handbook
- 4) SMT consider whether this paper should be published in full