

**EMPLOYER GUIDE**

# When Should You Refer an Employee for a Clinical Workplace Assessment?

Practical guidance for employers,  
HR professionals and managers



Independent  
Assessments



Registered  
Clinicians



Practical  
Recommendations

## Most employee health situations are not straightforward.

An employee may be struggling at work but still attending. A manager may be concerned about performance, wellbeing or attendance. HR teams are often balancing support, operational pressures and the need to make informed decisions.

The real challenge is understanding: What support does this employee need to remain in work, return to work successfully, or perform their role sustainably?

This is where a clinical workplace assessment can help. At Return Well, we connect organisations with registered clinicians who provide independent, workplace-focused assessments and practical recommendations.

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## What Is a Clinical Workplace Assessment?

A clinical workplace assessment is a structured assessment completed by a registered clinician. Unlike a standard medical appointment, the focus is on the impact a person's health or circumstances may be having on their ability to work.

- Whether the employee is fit for work
- Any barriers affecting work performance or attendance
- Potential workplace adjustments
- Support measures that may be beneficial
- Recommendations to support a sustainable return to work

*Our reports are written in plain English and focus on practical workplace solutions.*

## WHEN TO REFER

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Early intervention is often more effective than waiting. Consider a referral in any of the following situations.



### **Employee Struggling But Still Attending**

Signs of stress, reduced performance or withdrawal may indicate early-stage difficulties. Early support can prevent escalation to absence.



### **Mental Health-Related Absence**

Independent clinical guidance can clarify fitness for work, barriers to returning and the support required for a sustainable outcome.



### **A Return to Work Is Being Planned**

A fit note alone rarely explains how a return should be managed. Clinical recommendations can address phasing, adjustments and risk.



### **Previous Return Attempts Have Failed**

Recurring absence often indicates unresolved barriers. An assessment can identify what has been missed and recommend a more sustainable path.



### **Managers Need Independent Guidance**

Managers should not be expected to act as clinicians. Independent clinical input provides clarity, confidence and objective recommendations.



### **Workplace Adjustments Are Being Considered**

Clinical recommendations can include phased returns, adjusted duties, workload management, hybrid arrangements or additional support measures.

## 1. When a Clinical Workplace Assessment May Not Be Appropriate

A clinical workplace assessment is not suitable for every situation. It may not be appropriate where:

- The issue relates solely to conduct or disciplinary concerns
- There are no identified health or wellbeing factors
- The employee does not consent to engage
- An employer is seeking a diagnosis or medical treatment recommendation rather than workplace guidance

*If you are unsure whether a referral is appropriate, we are happy to discuss the situation with you before a referral is submitted.*

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## 2. Employer Referral Checklist

Ask yourself the following questions:

- ✓ Is the employee struggling to perform their role?
- ✓ Are you unsure whether they are fit for work?
- ✓ Has sickness absence become a concern?
- ✓ Are workplace adjustments being considered?
- ✓ Has a previous return-to-work plan been unsuccessful?
- ✓ Would independent clinical guidance help inform decision-making?

**If you answered yes to one or more of these questions, a clinical workplace assessment may be beneficial.**

## Every Return Well Assessment Includes:



### Independent Clinical Assessment

A structured discussion completed by a registered clinician, focused on work capacity and practical outcomes.



### Fitness For Work Opinion

Clear guidance regarding work capability and any identified barriers to attendance or performance.



### Functional Workplace Assessment

A focus on what the employee can do within the workplace and what support may be required.



### Practical Recommendations

Clear, workplace-focused recommendations designed to support sustainable outcomes for both employer and employee.



### Professional Report

A concise report written in plain English for employers, managers and HR professionals.



Most reports are delivered within 3–5 working days following assessment.

# Your Questions Answered

## **? Does the employee have to consent?**

Yes. Employee participation is entirely voluntary and informed consent is required before an assessment can take place.

## **? Will we receive medical information?**

Our reports focus on workplace impact, functional capacity and recommendations. We do not provide unnecessary medical information.

## **? Does the employee see the report?**

Yes. Employees are given the opportunity to review the report before it is released to the employer.

## **? What happens if the employee does not consent to the report being shared?**

The employer will be informed that the assessment has been completed. Return Well cannot compel an employee to share their report, and will always respect the employee's decision.

## **? How quickly can an assessment be arranged?**

Assessments are typically arranged promptly. Reports are generally delivered within 3–5 working days following assessment.

Have a question that is not covered here? We are happy to discuss your situation before you decide whether to refer.

support@returnwell.co.uk · 020 8154 9068

“ Having spent more than ten years working in HR, I understand how difficult it can be when an employee is struggling and there is no clear path forward. Managers and HR teams are often expected to navigate complex situations involving mental health, wellbeing and long-term absence without specialist clinical support.

Return Well was created to bridge that gap. Our aim is to provide employers with access to independent clinical expertise that helps people remain in work, return to work successfully and achieve sustainable outcomes for everyone involved.

**Alexandra Mesecke**  
Founder & Managing Director

## Not sure whether to refer? Let's have a conversation.

We are happy to discuss your situation before you decide whether a clinical workplace assessment is appropriate.

[Get in Touch](#)

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Supporting sustainable returns to work through independent clinical expertise.

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