

OCCUPATIONAL HEALTH REFERRAL AND FITNESS CERTIFICATE RECORD

FORM — HOLD SEPARATELY

The referral, the provider's answer, the adjustments — and no medical detail

KD-OH-RF-008 Rev A0

An occupational health referral asks a question about fitness for work and gets an answer the employer can act on: fit, fit with adjustments, not fit for now. It is not a medical record and this sheet does not hold one — the provider keeps the clinical detail; the employer holds the question, the consent, the certificate reference and the adjustments agreed, apart from the site file, under the Data Protection Act 2018 and UK GDPR. MHSWR 1999 reg 6 requires the health surveillance whose findings come here and reg 3 the assessment the outcome feeds; the referral is how a surveillance finding, an absence, an incident or the person's own request becomes a decision about the work. The person's line on KD-OH-HS-001 carries the outcome; the supervisor who must apply an adjustment is given the section 4 line, not the sheet.

1 THE REFERRAL

PROJECT / SITE REF	SITE	DATE	REFERRED BY (EMPLOYER)
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PERSON	EMPLOYER	ROLE AND TASKS	REFERRAL NO.
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- | | |
|---|--|
| ☐ Health surveillance outcome | ☐ At the person's own request |
| ☐ Return to work after absence | ☐ Fitness for a specific task — confined space, lone working, plant, night work |
| ☐ After an incident or near miss | ☐ Review of existing adjustments |

THE QUESTION FOR THE PROVIDER — ABOUT THE WORK, NOT THE PERSON'S HEALTH

2 CONSENT

I agree to be referred to the occupational health provider named below, to the provider being given my job description and the question above, and to the provider giving my employer a fitness-for-work certificate. I understand that clinical information stays with the provider, that I may ask to see the certificate before my employer does, and that I may withdraw my consent.

SIGNATURE	DATE	PROVIDER	REFERRAL SENT ON
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3 THE CERTIFICATE

CERTIFICATE REF	DATE	PROVIDER'S SIGNATORY	VALID UNTIL / REVIEW ON
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- | |
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| ☐ Fit for the role and tasks named |
| ☐ Fit with the adjustments in section 4 |
| ☐ Temporarily unfit — review on the date above |
| ☐ Not fit for the role or task named; suitable for the other work the provider states |
| ☐ Further information or assessment needed — the next step is written in section 4 |

4 ADJUSTMENTS AGREED — WHAT THE SITE MUST DO, NOT WHY

ADJUSTMENT / RESTRICTION	FROM	UNTIL / REVIEW	SUPERVISOR TOLD	ON HS-001

5 SIGNATURES

Held by the employer apart from the site file; seen by the person and the person referring; the supervisor who must apply an adjustment is given the section 4 line, not the sheet; retained for the period the employer's policy states. The person may see and copy it.

Employer:

PRINTED NAME	ROLE	COMPANY	SIGNATURE	DATE	TIME

The person — I have seen the outcome and the adjustments:

PRINTED NAME	ROLE	COMPANY	SIGNATURE	DATE	TIME

R REVISION HISTORY

Every revision of this document, and every review that found nothing to change. The revision on the front of this sheet is the one you are holding — check kubitdocs.com for the current one before use.

Rev	Date	Class	What changed	Authorised by
D0	2026-09-02	first-issue	First issue.	— not yet approved —
A0	2026-09-02	review	Approved for issue by the author. Content unchanged from the reviewed draft; the draft status strip is removed. No independent third-party review has been carried out.	Author — director, UK principal contractor, SMSTS. Not an independent review.

Class: first-issue · material (the law, a control, a field or the scope changed — past buyers are notified) · editorial (wording or layout only) · review (checked, nothing changed) · withdrawal. Revision prefix D = draft, not approved and not for sale; A = approved for issue by the person named, on the date shown.