

Healthy Company formal referral form 2026



Contact us

Tel: 0800 320 420; PO Box 784262, Sandton 2146; www.discovery.co.za.

How to complete this form

- Complete the form in full.
- Email the completed and signed form to healthycompanyformal@discovery.co.za.
- Please ensure that the employee initials each page and gives consent by signing this form.

1. Details of the referral

This section must be completed by the manager or supervisor who is referring the employee.

Has the employee agreed to the referral? Yes ☐ No ☐

Referring manager, supervisor or HR person's details	Employee's details
Full name	Full name
Job title	Job title
Business unit	ID number
Cellphone number	Cellphone number
Work number	Work number
Email address	Email address
Does the employee consent to a voice message or SMS on their cellphone number? Yes ☐ No ☐	Preferred time of contact
	08:00 - 11:00 ☐
	11:00 - 14:00 ☐
	14:00 - 17:00 ☐
	Anytime ☐

HR person's details - To be included in all formal feedback (optional)

Full name	
Cellphone number	
Email address	

Please give a detailed reason for the referral:

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What is the employee's explanation of their issue?

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Is there any information other than the above which may be relevant to this case?

2. Impact on work performance

This section must be completed by the employee's line manager or the HR person who is referring the employee.

Is there a current disciplinary or incapacity process related to this referral?

Yes

☐

No

☐

If you answered **Yes** to the above, please select an option:

Disciplinary process

☐

Incapacity process

☐

Please review the list of work-performance-related issues below and select all of the applicable issues that affects the employee's work. Please give any known dates and a description of the issue.

Category and selection	Date	Description of the issue
2.1. Absence from work		
• Excessive sick leave	☐	
• Regular absence on Mondays, Fridays or after paydays	☐	
• Above average absence due to vague ailments, such as colds	☐	
• Unauthorised leave	☐	
• Strange and unsatisfactory excuses for absence	☐	
• Vague or frequent requests to leave early	☐	
2.2 Presence at work		
• Continual absence from post	☐	
• Arriving late for work, taking long breaks	☐	
• Sleeping on duty	☐	
• Spending significant amounts of time on items of a personal nature, such as internet searches, online shopping	☐	
2.3 Accident record		
• Accidents on duty	☐	
• Accidents outside working hours that impact work performance	☐	
• Involvement of other employees in accidents	☐	
• Near-miss incidents	☐	
2.4 Work efficiency		
• Problems with concentration	☐	
• Working sporadically or intermittently	☐	
• Difficulty in remembering instructions or details, or accepting responsibility for their mistakes	☐	
• Finding it increasingly difficult to carry out complicated instructions	☐	
• Not completing work within designated time	☐	
• High frequency of mistakes	☐	
• Poor judgement and decision making	☐	
• Complaints from others about the services the person renders	☐	
• Wasting of time or materials	☐	
• Unacceptable excuses for poor work performance	☐	

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2.5 Interpersonal relations with employees		
• Over-reaction to real or imagined criticism	☐	
• Sudden mood changes	☐	
• Complications as a result of borrowing money from fellow workers	☐	
• Behaviour that causes an unfavourable reaction from others	☐	
• Unwarranted grievances	☐	
• Avoidance of fellow workers (detachment)	☐	
• Involvement in conflicts or fighting with fellow workers	☐	
• Involvement in conflicts or fighting with supervisor or management	☐	
2.6 General appearance and behaviour		
• Perceived abnormal reactions to normal circumstances	☐	
• Noticeable decline in personal hygiene and/or appearance (including their workstation)	☐	
• Complaints by fellow workers about the person's conduct	☐	
• Abnormal behaviour	☐	
• Risk to self or others	☐	
2.7 Substance use/misuse/abuse		
• Smelling of alcohol during working hours	☐	
• Being under the influence of substances during working hours	☐	
• Positive breathalyser test	☐	
• Being in conflict with the law because of driving a vehicle drunk	☐	
• Disclosure of substance-abuse issue by employee	☐	
2.8 Legal problems		
• Any legal issues, including court proceedings	☐	
2.9 Other (please specify)		

3. Consent from employee

As part of the manager referral process, a Healthy Company coach will contact you once they have received this signed form. The coach may have to give feedback to your referring manager, supervisor or another person or party in the form of a report.

Please note: This feedback is based on key findings and recommendations made during and upon completion of the counselling process as they relate to your work performance or as the case may be. We will not disclose personal information that does not relate directly to your work performance.

By signing this form, you agree that all information the referring manager or supervisor captured is true and correct and that you have received a copy of this form. By signing this form you also give consent for a Healthy Company coach to:

- Contact you, give counselling and refer you to another professional.
- Give feedback to your referring manager, supervisor or another nominated person or party.

Employee's name							
Employee's signature							Date
Referring manager or supervisor name							
Referring manager or supervisor's signature							Date