



Workplace Needs Assessment Referrer Journey

February 2026



Workplace Needs Assessment (WPA)

This information sheet details how a Workplace Needs Assessment (WPA) works and what to expect.

What happens when I make a referral?

- Once your referral has been triaged, our admin team will be in contact with the employee to book the assessment.
- You will receive an email confirmation of your appointment date and time (this will include the meeting link).
- You and the employee will be sent pre-assessment questionnaires. Please return these to wpateam@healthpartners.uk.com 72 hours prior to the assessment. This allows your assessor to have a brief understanding prior to the assessment. For some organisations this is part of the referral form.

Virtual assessment check list

As our assessments are conducted remotely, you will need the following:

- Access to a computer or smart phone device (camera and audio required)
- Access to video conferencing (Whereby, Microsoft Teams)
- Access to a comfortable, private space (away from noise and distractions)

What happens during the assessment?

The employee will have the assessment first, which usually lasts between 1 to 1.5 hours.

Following the employee assessment, the referrer will be requested to attend the last 30 minutes of the assessment. If the referrer differs from the line manager, this discussion should be held with the employee and consent provided. The employee will be asked to confirm consent on their part of the assessment to ensure we can speak to you. This is an opportunity to discuss potential adjustments and if there are any additional components that need to be discussed.

This is usually a private conversation; however, if the employee would like to join, this is at

What will be discussed?

- We will talk about the current expectations within the role including key objectives and targets.
- We will further explore the employee's strengths and challenges within the workplace.
- We will discuss potential solutions exploring the feasibility within the workplace.
- You will have an opportunity to ask any questions.

What happens after the assessment?

- Following the assessment, the assessor will generate a report. This will outline the recommended adjustments and provide a rationale for the adjustments. These recommendations are for guidance purposes only, and it is for management to decide if the recommendations are deemed reasonable and operationally viable.
- The report will be released in line with the employee's consent via Gateway. If this is released to the employee to review first, we will require their written consent before we can share this with you.
- Once you receive the report, take some time to review it properly.
- If you would like to discuss the content of the report with the assessor or identify any inaccuracies, please get in touch via wpateam@healthpartners.uk.com. Any requests for amendments need to be made in writing.
- We recommend arranging a time with your employee to discuss the content of the report and to agree on how you will move forward.

Frequently Asked Questions

What if I need to change my appointment?

If you need to cancel your 'referrer' appointment, please let us know – the assessment can still go ahead, and the report can be generated. We would encourage you to complete the pre-questionnaire or try to arrange an alternative time that suits you.

If you are unable to attend and would like to discuss this report once received, please contact us at wpateam@healthpartners.uk.com.

If you are unable to attend this meeting within 5 working days of the assessment the report will be released.

How will the assessment be conducted?

Assessments will be conducted virtually using video-conferencing via Whereby or Microsoft Teams. You will be provided with a link to attend your assessment.

Who can attend the referrer element of the call?

We require consent from the employee to discuss their details. If the Line Manager for the employee is different to the referrer we will require the employees consent to speak with this individual. It would be beneficial to advise this in advance so we can gain consent during the employee element of the call.

What type of questions will I be asked?

The discussion will explore current expectations from the role, objectives and targets, the employee's key strengths and areas of development and how the employee is currently managing within the role. This information will be helpful to further guide our recommendations.

Is this a diagnostic assessment?

This is a Workplace Needs Assessment. No formal diagnosis will be evaluated or made.

What type of recommendations will be made?

Each assessment is individual, therefore recommendations can vary widely; however, recommendations that frequently occur involve specific strategies, assistive software and short-term human intervention, such as coaching.

We would like to proceed with the recommendations. How does this happen?

- A quote for the cost of the recommendation(s) will be supplied after the assessment or upon request.
- If you would like to go ahead and order these recommendations through us, please send authorisation to proceed to wpateam@healthpartners.uk.com.
- We will then organise the implementation of recommendations through our third-party supplier.
- Our supplier will be in touch with you to provide details of delivery of equipment, installation of software or to arrange coaching/training.
- We recommend arranging time with your employee to review the recommendations once implemented to ensure they are happy with the adjustments.