

## **Bourne Education Trust Sickness Absence Policy & Procedure**

### **1. Introduction**

- 1.1. This Sickness Absence Procedure should be read and applied in conjunction with Bourne Education Trust's ('BET' or 'the Trust') Attendance Management Policy.
- 1.2. As the legal employer of all members of staff within both the central team and all Bourne Education Trust schools, Bourne Education Trust recognises its responsibility for the health, safety and welfare of its employees. This Sickness Absence Procedure sets out the process for reporting sickness absence and for the management of sickness absence in a fair and consistent way. This procedure places emphasis on proactive support for staff in the event of ill health difficulties and as outlined within this policy, certain line management duties within the Sickness Absence Procedure will be delegated by the Trust to an appropriate staff member within its constituent schools.
- 1.3. Sickness absence can vary from short intermittent periods of ill-health to a continuous period of long-term absence and have a number of different causes (for example, injuries, recurring conditions, or a serious illness requiring lengthy treatment).
- 1.4. Sickness absence may result from a disability defined in the Equality Act 2010. Reasonable adjustments to this procedure may be considered in appropriate cases, depending on the specific circumstances. HR advice should be obtained where the line manager considers the employee is likely to have a disability.
- 1.5. Bourne Education Trust has standards for attendance for employees, as it does for pupils, and measures will be taken to monitor and respond to actual and potential problems.

### **2. Management Responsibilities**

- 2.1. It is the responsibility of the Chief Executive Officer (CEO) and all levels of management to ensure acceptable levels of attendance are achieved and to raise awareness of the effect of sickness absence levels on the quality and continuity of teaching and learning and other aspects of the effectiveness of the work of Bourne Education Trust.
- 2.2. Senior managers and line managers have a clear obligation placed on them to identify and address problems in the work environment and/or job factors that may be contributing to staff absence.
- 2.3. In normal circumstances, managers with authority to conduct sickness absence related meetings within Bourne Education Trust are as follows:

Return to work interviews

Line Manager, Member of SLT, Headteacher, Head of School, Principal, Executive Team member, CEO, COO or any other senior leader/manager as designated by the CEO/COO.

Informal sickness absence meetings

Line Manager, Member of SLT, Headteacher, Head of School, Principal, Executive Team member, CEO, COO or any other senior leader/manager as designated by the CEO/COO.

Stage 1 meeting and review other manager's stage 1 decisions at appeal

Member of SLT, Headteacher, Head of School, Principal, Executive Team member, CEO, COO or any other senior leader/manager as designated by the CEO/COO.

Stage 2 meeting

Headteacher, Head of School, Principal, Executive Team member, CEO, COO.

### **3. Employee Responsibilities**

- 3.1. Employees must attend work when fit to do so.
- 3.2. All employees must follow the Notification of Sickness Absence procedures as set out in the relevant staff handbook for their Bourne Education Trust school or, in the case of BET central team members, as advised by the CEO/COO. This includes employees who are in a probationary period.
- 3.3. If an employee does not report for work, and has not explained the reason for absence, then the employee should expect to be contacted by telephone, email, letter or text during the period of absence by the employee's line manager, who will want to enquire after the employee's health and be advised, if possible, as to the employee's expected return date. This must not be treated as a substitute for reporting sickness absence. Absence that has not been notified in accordance with the sickness absence reporting procedure will be treated as unauthorised absence.
- 3.4. All employees must complete a self-certification form detailing the reason for absence for any period of sickness absence up to seven days. The self-certification form can be obtained from the school/Trust office and must be completed immediately on return to duty and returned to the employee's line manager.
- 3.5. A medical certificate (a 'Statement of Fitness for Work' hereinafter called a 'Fit Note') must be provided from the eighth day of absence (including Saturdays and Sundays). This should be provided to the line manager as soon as possible and, if absence continues further, Fit Notes should be provided to cover the whole period of absence. Failure to do so may result in non-payment of sick pay (where applicable) and/or disciplinary action if appropriate.

- 3.6. Employees must continue to submit Fit Notes during school closure periods. The Trust may take a copy of the Fit Note for their records and return the original copy to the employee.
- 3.7. An employee shall, if required at any time, attend an Occupational Health (OH) or other medical appointment/examination by a registered medical practitioner nominated by the Trust.

#### **4. Sickness Absence Monitoring**

- 4.1. Levels of sickness absence will be monitored. The number of working days lost due to sickness per employee will be recorded and areas where the work of the Trust, in particular the continuity of teaching and learning, is being affected by absence levels will be identified. This will include a breakdown of total absence into long-term and short-term absence (normally more than 28 days) and reasons for absence. The information will be reported to the Trustees on an anonymised basis.

#### **5. Reimbursement of Cost of Doctors' Statements**

- 5.1. Where the Trust requires a medical certificate ('Fit Note') from an employee, the Trust shall, on provision of a receipt, reimburse the employee if a charge is made for the Fit Note.

#### **6. Illness or Injury Arising from Work**

- 6.1. Any accident arising out of, or in the course of, employment with Bourne Education Trust must be reported and recorded in accordance with the required procedures. The accident may be subject to investigation and reported by an employee authorised for this purpose by the Trust.
- 6.2. Where an employee seeks medical advice about an illness which is suspected or alleged to result from the nature of his or her employment, the employee must report relevant information to whichever is the most applicable of the Headteacher/Head of School/Principal/Executive Team member/CEO/COO at the first opportunity.
- 6.3. In the case of the first, and any subsequent, absence due to industrial disease or accident an employee shall agree, at any time during such absence, if so required by the employer, to a medical examination by a registered medical practitioner nominated by the Trust.

#### **7. General Return to Work Arrangements**

- 7.1. If the employee returns to work with a Fit Note which states 'may be fit for work', the employee should notify their line manager immediately. The advice on the note will be discussed together with any additional measures that may be needed to facilitate the employee's return to work, taking into account the doctor's advice.

- 7.2. Consideration will be given as to how the advice impacts the employee, the job, the workplace, service delivery, pupils and colleagues. The doctor's comments, any of the return to work tick boxes and any other action that could facilitate a return to work will be considered with due regard to the Equality Act 2010. Options may include:
- Phased return to work
  - Altered hours
  - Amended duties
  - Consideration of redeployment
  - Workplace adaptations
  - Other reasonable adjustments.
- 7.3. If a return to work is possible, the agreed action plan will be documented and implemented. If it is not possible to provide the support suggested by the doctor, the employee will remain on sick leave and will not normally need to return to their doctor to obtain a revised Fit Note unless this is required in the circumstances. A review date will be set.
- 7.4. Consideration will be given as to whether a risk assessment is required to ensure the health and safety of the employee in light of the reason for their ill health, for example a stress, ergonomic or more general risk assessment may be required.
- 7.5. The employee may return to work before the expiry of a Fit Note without going back to see their doctor, even if their G.P has indicated that they need to assess them again. This will not breach Bourne Education Trust's Employer's Liability Compulsory Insurance, providing a suitable risk assessment has taken place if required.
- 7.6. Phased returns
- 7.6.1. Where an employee returns to work on a part time basis, following long-term sickness absence, with the expectation that they will be able to work their full contractual hours (or other such amended contractual hours as agreed) within a reasonable period of time, then, in accordance with medical advice provided by the Occupational Health doctor or the Fit for Work service, the following arrangements will normally be made in relation to pay:
- Where the employee has exhausted their sick pay entitlement, the salary payment made will be based on the number of hours worked during the phased return.
  - Where the employee has not exhausted their sick pay entitlement, the employee will be paid in accordance with the number of hours worked, or the occupational sick pay entitlement that would be payable if the employee remained off work due to sickness absence, whichever is the greater amount.

## 8. Unauthorised Absence/False Information

- 8.1. Unauthorised absence will be dealt with under the disciplinary procedure and could result in disciplinary action which may include dismissal.
- 8.2. The provision of any false information will be dealt with under our disciplinary procedure and could result in disciplinary action, which may include dismissal.

## 9. Managing Short-Term Absence

Genuine short-term absences which occur over a limited period of time are usually best managed through discussion with the individual at return-to-work interviews, which may include consideration of advice from occupational health.

Where, however genuine, the number and/or frequency of absences becomes detrimental to the normal operation of the school, formal action will proceed this policy.

## 10. Managing Long-Term Absence

Definitions	
Long-term absence	Long-term absence is intended to refer to absences that have lasted, or are expected to last, for a period of at least 4 weeks.

Long-term absence will occur for different reasons and is therefore best managed according to the individual circumstances of the case. The key principle in managing long-term absence is ensuring that a balance is struck between the needs of the employee and the needs of the school.

Where it becomes apparent that absence is likely to be long term, an appropriate strategy should be put in place to ensure that the individual does not become isolated from work and that timely OH advice is received about the prognosis. Maintaining regular contact is essential although managers are expected to act considerately to avoid the employee feeling that he/she is being put under undue pressure. Where possible, the mechanism and regularity of contact will be agreed with the individual or his/her nominated representative. Where the employee is a member of a union, he/she may also wish to involve his/her union representative as a source of support and as a means of facilitating communication.

OH advice should be sought as soon as it becomes likely that the absence will be long term and periodically thereafter as necessary to support the employee's return to work, which will often include consideration of a phased return. Where OH advice indicates that there is no realistic prospect of a return to normal duties within the reasonably foreseeable future, consideration will be given to whether temporary or permanent redeployment might impact positively on the employee's ability to return to work. Where this is not possible, ill-health retirement or dismissal on the grounds of capability will ultimately be considered. These options are explained in more detail as follows:

<b>Options for Managing Long Term Absence</b>	
<b>Phased Return</b>	<p>After a period of long-term absence, the employee's doctor and/or OH will often recommend a phased return programme to support the employee's return to full duties. Whilst the duration and nature of a phased return will depend on the individual circumstances, it is expected that, in general, this will not exceed a period of six weeks. Changes to an employee's working hours, pattern or duties on a longer term basis will be considered as a temporary redeployment (see below).</p>
<b>Temporary Redeployment or Adjustments</b>	<p>Where the employee is deemed currently unfit to carry out the full duties of his/her post but could be temporarily redeployed to alternative work (or adjustments made to the role or working hours on a temporary basis), the school will consider what options might be realistic and reasonable, taking into account the advice of OH and the employee's doctor(s). Unless such arrangements are short term and therefore being treated as a phased return (see above), the ramifications in relation to salary, pension and any other affected terms and conditions, must be explained to the member of staff and confirmed in writing. Where temporary redeployment cannot be facilitated, the employee will remain on sick leave until he/she is either fit to return to normal duties or whilst the remaining options are considered.</p>
<b>Permanent Redeployment or Adjustments</b>	<p>Where the employee is deemed permanently incapable of carrying out the duties of his/her current post but may be fit to return to work in another capacity (or permanent adjustments could be made to the role or working hours), the school will consider what posts or adjustments might be available and suitable, taking into account the advice of OH and the employee's doctor(s).</p> <p>The likelihood of a successful redeployment will depend on a number of factors, including the employee's skills, abilities and flexibility over hours and work location. Each situation will be treated individually according to the circumstances. The employee will remain on sick leave pending consideration of the adjustments or redeployment options available. An employee permanently redeployed into another role will be appointed on the terms and conditions applicable to the new post.</p> <p>Sometimes the likelihood of suitable alternative posts arising is simply not a realistic prospect and the employee's expectations will be managed accordingly.</p>

<p><b>Ill-Health Retirement or Dismissal</b></p>	<p>Where the employee is deemed unfit to carry out the duties of his/her present post in the reasonably foreseeable future and where redeployment has already been explored and an alternative post has not been secured, the matter will be referred for consideration according to the Trust's Capability procedure.</p> <p>Retirement on the grounds of ill health may be an option to be investigated under certain conditions, as an alternative to dismissal (in the case of teachers, the application process for ill-health retirement is initiated by the individual).</p> <p>In determining the point at which it becomes appropriate to refer the matter, the manager will seek HR advice and further OH advice as necessary, and take into consideration the following factors:</p> <ul style="list-style-type: none"> <li>▪ The length of absence to date and the prognosis for a return to work;</li> <li>▪ The nature of the illness and the medical advice obtained;</li> <li>▪ The 'Fitness to Teach' regulations, as appropriate to the role;</li> <li>▪ Whether the individual's absence is related to a disability;</li> <li>▪ The effect of the absence on the school;</li> <li>▪ What options, as alternatives to dismissal, have already been considered;</li> <li>▪ Any relevant personal circumstances pertaining to the individual that may be impacting on their attendance.</li> </ul> <p>The employee should be given the opportunity to input into this consideration before a formal meeting under the Capability procedure is called. This may be a meeting in person, if circumstances permit, or via another agreed mechanism, such as communication via the employee's union representative. The purpose of this exchange is to ensure that all relevant factors and options have been taken into account before a recommendation is made to terminate employment on the grounds of incapability through ill health.</p>
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## 11. Informal Procedure

### 11.1. Return to Work Discussion

- 11.1.1. The line manager will normally have a discussion with the employee on their return from a period of sickness absence. The purpose of this discussion is to determine the reason for the absence and, where appropriate, offer assistance and support. It is also an opportunity to identify any difficulties that the employee is experiencing in carrying out the duties of the post and gives the employee an opportunity to raise any concerns or questions and bring any matters to the line manager's attention. The return to work discussion should be held in private as soon as possible after a period of sickness absence, though it need not be long.

When a note of the matters discussed at the meeting is made to record any action points, the employee will be provided with a copy.

## 11.2. Informal Sickness Absence Meetings

11.2.1. Informal sickness absence meetings may be arranged with employees whenever it is considered necessary including, for example, if an employee has had:

- 3 separate occasions of absence, irrespective of length, during a 6 month period
- A total of 10 days absence in a 6 month period (over 2 or more occasions) or
- Where there are concerns about an employee's absence, such as level or pattern.

11.2.2 In preparation for the meeting the line manager holding the meeting may, when appropriate:

- Consider the Trust's statistical data on levels and types of sickness absence for all staff to ensure consistency
- Confirm that an unsatisfactory level of attendance has been reached, depending on the circumstances, or that the record shows a pattern of absence or some other factual data which identifies the cause for concern
- Consider the job description and the impact of the absences on other employees and the work of the Academy and the Trust

11.2.2. The purpose of the meeting is to agree a way forward, any action that will be taken and a timescale for review and/or a further meeting under the sickness absence procedure if this is required.

11.2.3. The manager will, in normal circumstances, use the sickness absence meeting proforma at Appendix A as the agenda for the meeting and will record salient points. The employee will be given a completed signed copy after the meeting.

11.3. There is no entitlement for the employee to be accompanied by a companion at an informal sickness absence meeting. A note taker may be present but that will not normally be necessary.

## 11.4. Monitoring period following Informal sickness absence meeting

11.4.1. After conducting a sickness absence meeting, the manager will review or monitor the employee's attendance for a further period, normally this will be for a period of not less than one month and no longer than three months. Further meetings may take place during the monitoring period if there are further instances of sickness absence.

11.4.2. The manager will:



- Assess the employee's absence record and its impact
  - Attempt to establish reasons for any on-going absence/s
  - Offer any assistance to the employee (e.g. Occupational Health, Employee Assistance/Counselling)
  - Consider what, if any, measures might improve the employee's health and/or attendance with a view to supporting the employee and improving the employee's attendance record.
- 11.4.3. During the monitoring period the manager/member of SLT may require that any period of absence is covered by a medical certificate (Fit Note). If the employee has a fit note which states 'may be fit for work', the process in paragraph 7 will also be followed. If the suggested support cannot be reasonably accommodated in order to facilitate the employee's return to work, a decision may be made to move to the formal part of the procedure.
- 11.4.4. Where the manager is of the view that the employee's attendance has not improved to an acceptable level after the review period, the s/he should inform the employee that the issue will:
- Be referred to stage 1 of the formal procedure. A letter requiring attendance at a stage 1 meeting will be sent to the employee; or
  - There are exceptional circumstances and it is appropriate to do so, extend the review period.

## 12. Formal Procedure

- 12.1. There are two stages in the formal process. The type of case (i.e. short or long-term absence) will determine the need to move either through the stages (short-term absence), or, in some circumstances, directly to stage 2 (long-term absence). The procedure can end at any point in the process if there is sustained improvement. If further unacceptable periods of absence arise within 12 months of a stage 1 meeting being held, the procedure may resume at stage 2.
- 12.2. Stage 1 Meeting
- 12.2.1. A stage 1 meeting constitutes a formal meeting and should be arranged in accordance with Bourne Education Trust's Attendance Management Policy.
- 12.2.2. At the stage 1 meeting the Member of SLT/ Headteacher/Head of School/Principal/Executive Team member/CEO/COO or any other senior leader/manager as designated by the CEO/COO (hereafter referred to as "the Senior Leader/Manager") will explain the purpose of the meeting. The following points are by way of guidance only:
- Discuss the reasons, including any underlying causes for the employee's absence.

- Explain how the employee's attendance has been assessed as unacceptable and the effect on teaching and learning, service delivery and colleagues.
- Review the results of the informal procedure, including any measures taken to support the employee so far. Include any reasonable adjustments if appropriate, any work-related issues and consider the content of any medical reports and advice received.
- Discuss the likelihood of further absences, if absent on a number of occasions or how long the absence is likely to last, if absent on long-term sickness absence.
- Seek agreement from the employee for a referral to Occupational Health if this is required and/or appropriate in the circumstances.
- Consider the employee's ability to return to/remain in their job in view both of their capabilities and the School/Trust needs and any adjustments that can reasonably be made, if appropriate, to their job to enable them to do so.
- Consider possible redeployment opportunities and whether any adjustments can reasonably be made, if appropriate, to assist in redeploying the employee.
- Where the employee is able to return from long-term sick leave, whether to their job or a redeployed job if possible and/or appropriate, agreeing a return to work programme.
- Give the employee and/or any companion the opportunity to explain any mitigating circumstances.
- If appropriate, inform the employee that they may wish to consult their pension scheme provider with regard to ill health benefits.
- Discuss the way forward and determine an action plan that clearly identifies:
  - The improvements necessary to achieve satisfactory levels of attendance
  - The timescale for improvement
  - How attendance will be measured/monitored
  - Any additional support/training to be provided
  - The review period, (normally one month and no more than three months).

12.2.3. When confirming the outcome of the stage 1 meeting, the Senior Leader/Manager will include:

- a) The action plan
- b) The improvements required and the likely consequences of further absence during the review period (stage 2 meeting)
- c) Right of appeal.

### 12.3. Stage 1 Review Period

12.3.1. The Senior Leader/Manager will ensure that during the review period the employee's attendance is closely and objectively monitored. Normally, if practicably possible, weekly supervision meetings will be held between the employee and their line manager to ensure:

- Effective monitoring
- Appropriate support is given to the employee
- Positive feedback is given where possible
- If further periods of non-attendance are identified, the reasons are discussed.

12.3.2. Notes of the monitoring process will normally be kept in the employee's file and a copy provided to the employee. The notes may be referred to during stage 2 of the procedure.

#### 12.4. Stage 1 Review Period Evaluation

12.4.1. If, at the end of the review period, the employee's level of attendance has improved to acceptable standards, no further action will be taken under this procedure, unless an acceptable level of attendance is not sustained during the next 12 months.

12.4.2. The decision to take no further action will be confirmed by the Headteacher / Head of School / Principal / Executive Team member/CEO/COO in writing, normally within 5 working days of the end of the review period. This letter will also confirm that the improved attendance must be sustained consistently during the next 12 months and explain that if there are further unacceptable periods of absence the sickness absence procedure may be invoked at stage 2. A copy of this letter will be kept on the employee's personnel file for 12 months.

12.4.3. If, at the end of the review period, the employee's attendance has not improved to acceptable standards then:

- The issue will be referred to the Headteacher/Executive Group member under stage 2 of this policy.
- In exceptional circumstances, if appropriate, the review period will be extended.

12.4.4. Where the employee is in a Pension Scheme it may be appropriate to explore eligibility for an ill health pension award prior to convening a stage 2 meeting.

#### 12.5. Stage 2 Meeting

12.5.1. A stage 2 meeting constitutes a formal meeting.

12.5.2. The Headteacher/Member of the Executive Group will conduct the meeting (with advice from an HR Advisor where necessary) and may, by way of guidance only:

- Explain the purpose of the stage 2 meeting
- Ask the manager, who has been responsible for managing stage 1, to outline:
  - The ways in which the employee has been assessed as not meeting the expected levels of attendance due to ill-health
  - The process so far under the Sickness Absence Procedure
  - Any opportunities for return or redeployment that have been identified and where identified, the outcome of discussions with the employee.
- Review, as appropriate:
  - Levels of attendance expected
  - Notes of the formal sickness absence meetings, records of home visits or other meetings plus any other information relating to the informal action taken
  - The previous monitoring of attendance and steps taken under any appropriate action plans
  - Medical advice received from Occupational Health or other medical specialists
  - Measures taken by management to support the employee, e.g. reasonable adjustments, if applicable.
- Discuss with the employee and their companion whether the employee has been assessed as achieving the required improvements in attendance
- Review the effect of the unsatisfactory level of attendance on teaching and learning, service delivery and work colleagues
- Explore, as appropriate, the potential for the employee to achieve a sustained improvement in attendance
- Give the employee and/or their companion opportunity to answer the points made and to give an explanation or put forward any mitigating circumstances.

## 12.6. Stage 2 Decision

12.6.1. Following the discussions, the Chair of the stage 2 meeting will adjourn the meeting to consider the options available including, without limit, and for guidance only:

- To take no further action under the procedure.
- To set a further/final review period to allow for additional monitoring and/or additional management support. A further formal stage 2 meeting may be held at the end of this review period. If attendance is not satisfactory by that time then the employee may be dismissed.
- To dismiss the employee for lack of capability due to ill-health, ensuring that alternative work options have already been explored or will be explored during the employee's notice period, that there is no

prospect of their return within a reasonable timeframe, or that they will be able to achieve or sustain their attendance.

### 13. Right of Appeal

13.1. The employee has the right to appeal against decisions reached at stage 1 and stage 2, in accordance with the following process.

#### 13.1.1. Stage 1 Appeals

13.1.1.1. Appeals against stage 1 decisions should be submitted to Headteacher/Executive Group member

13.1.1.2. Appeals against stage 1 decisions will be heard by Headteacher/Executive Group member. The outcome may be to:

- Dismiss the appeal, i.e. the decision to progress to stage 2 remains in force
- Refer to a lower stage in the formal process; and/or
- Reduce standards of attendance or targets set in the action plan; drop the formal process.

#### 13.1.2. Stage 2 Appeals

13.1.2.1. Appeals against stage 2 decisions should be submitted to Executive Group Member/Local Governing Committee/Board of Trustees.

13.1.2.2. Appeals against stage 2 decisions will be heard by Executive Group Member/Local Governing Committee/Board of Trustees. The outcome may be to:

- Uphold the appeal (i.e. to reinstate the employee); and/or
- Issue a lesser level of management action, e.g. to:
  - Drop the formal process
  - Refer to a lower stage in the formal process; and/or
  - Reduce standards of attendance or targets set in the action plan; or
  - Dismiss the appeal, i.e. the decision to dismiss remains in force.

Date drafted	Spring term 2020
Author	E. Hilling
Approved by	BET HR&R Committee
Next review	Spring Term 2023

## Appendix A: Return to Work and Self Certification Form

### Self-Certification & Return-to-Work Discussion Form

Part A: To be completed by employee upon their return to work following sickness absence				
Full Name				
Date you first became unfit for work (inc. weekends & hols)		Date of first absence from work		
Date you returned to work		Total number of working days' absence		
Type of sickness (eg. Cold/flu, stomach bug, headache)				
I have consulted my GP			YES	NO
I have visited a hospital/clinic			YES	NO
I have sought other medical advice (e.g. NHS Direct, pharmacist)			YES	NO
Is this absence linked to a previous period of absence?			YES	NO
Is this absence Covid-19 related?			YES	NO
If yes, which of the following apply?	Self Isolating: able to work	Self Isolating: not able to work	Covid-19 Positive	Looking after a dependant who is self isolating
Was your absence due to work-related causes, including an accident or injury at work? If yes, please provide details below.			YES	NO

Any other comments:		
I confirm that the information I have provided is complete and accurate to the best of my knowledge and belief. I understand that deliberately providing false information may result in disciplinary action being taken against me.		
Signed		Date
<b>Part B: To be completed by manager following discussion with employee</b>		
Manager's Full Name		
Please confirm that the details provided by the employee in Part A are correct, to the best of your knowledge	YES	NO
Did the employee properly notify his/her absence (and submit medical certificates if relevant)?	YES	NO
Has a 'fit note' been submitted making recommendations as to a phased return or changes to hours or duties?	YES	NO
Has the employee indicated that factors at work may have caused or contributed to the absence?	YES	NO
Does this period of absence cause the absence trigger point to be exceeded?	YES	NO
Should a referral to occupational health be made at this stage?	YES	NO
In view of the above, and your discussion with the employee, please detail below any further action to be taken.		
Any other comments:		



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I confirm that I have shown the contents of the above to the employee and offered him/her a copy. A copy will be placed on the employee's personnel file.

Signed		Date	
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## Appendix B: Sickness Absence Meeting Record

This is the management record of a meeting held under paragraph 11 of the sickness absence policy and procedure. It is strictly confidential. It will be held on the employee's personnel file until such time as the employee's attendance is wholly satisfactory and for 12 months thereafter. The record may be accessed and referred to by those with authority to manage the informal and formal stages of the sickness absence procedure. A sickness absence meeting is not part of the formal procedure and there is no entitlement for the employee to be accompanied or represented. The meeting will be held in private.

Employee name:	
Length of service:	
Date of meeting:	
Interviewing manager:	

### Details of Sickness Absence

Period of absence:	
Number of days absent:	
Reason/s for absence:	
Is absence related to a known or possible disability under the Equality Act? Has there been consideration of whether the 'trigger point' relating to days absence should be extended, or if the sickness absence policy should otherwise be modified?	
Yes: <input type="checkbox"/> No: <input type="checkbox"/>	
(If yes – details of medical evidence must be attached)	

## Details of Meeting

Key points discussed:

Welcome and update, if necessary, on work events and changes

Reasons for absence – underlying medical condition?

The value of your contribution? The impact of absence on teaching and learning, service delivery and colleagues. How your work has been covered in your absence.

Are you fully recovered and able to resume full duties?

Yes:  No:

If your view is **no** then action plan should consider:

- Referral to Occupational Health (OH)
- Temporary adjustments which can reasonably be accommodated?

## Action Plan

The objective is that attendance will be satisfactory to the employer. Is there anything we can do to improve your attendance, e.g. OH referral, counselling, a review of risk assessment, temporary or permanent reasonable adjustments to the workplace, working practices or working hours or training?

Is your absence in any way related to work?

Are you doing all you can to improve your attendance?

e.g. Act on medical advice, lifestyle choices, attention to work life balance, non-medical support e.g. counselling.

Fit note required for any period of absence during the monitoring period?  
(see paras 3 and 10.3)

Yes:

No:

## Review

Attendance will be reviewed in:	
1 Month: <input type="checkbox"/>	2 Months: <input type="checkbox"/> 3 Months: <input type="checkbox"/>
Date of Review:	
Please note that further absence during this period may, depending on the circumstances, mean that the review is held under Stage 1 of the formal procedure if appropriate.	
Copy of sickness absence policy and procedure has been provided and process explained (must be provided and explained prior to a formal meeting)	
Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Date: <input type="text"/>

Signature of manager	<input type="text"/>	Date:	<input type="text"/>
Signature of employee:	<input type="text"/>	Date:	<input type="text"/>