

## Manager's Checklist – Occupational Stress

### Key Management Actions

- v' Ensure that action is taken as soon as practicable once it has been brought to your attention or you suspect that stress has become an issue for an employee who remains at work.

#### Employee currently at work

- v' Discuss with the employee as soon as practicable whether or not they have been experiencing stress and what the employee believes the contributing factors are.
- v' Ensure the discussion takes place in a private location and sufficient time is set aside for the discussion.
- v' If an employee confirms that they are facing difficulties in their personal life, be supportive and advise them of [sources of support](#) which may be of help to them.
- v' Record the discussion on the [stress record of discussion](#) form and forward to the Employment & Payroll Team.
- v' If an employee confirms that there are work-related factors contributing to their wellbeing, discuss what these factors are and explain the [stress action process](#)
- v' If an employee advises that the manager is their stressor and they do not feel they are in a position to discuss this in detail with their manager, an alternative manager can be sourced to discuss this matter further.
- v' Agree with the employee whether it would be appropriate to agree an individual stress action plan or whether appropriate control measures can be agreed outwith the stress action plan process.
- v' If appropriate control measures can be agreed as part of the initial discussions the manager should ensure that the control measures are either documented on the stress record of discussion form or by other means deemed appropriate by the manager and employee. A review of the control measures should also be planned at an appropriate juncture.
- v' In the instance that there are work-related factors contributing to an employee's wellbeing, a copy of the stress record of discussion form should also be forwarded to the Health, Safety & Wellbeing Team.

- v' If engaging with the employee to develop an individual stress action plan and an action plan has been agreed previously, provide the employee with a copy along with the [sample stress action plan](#), [blank stress action plan](#) and the information pertaining to the HSE management standards - [How to - Approach Occupational Stress Proactively](#)
- v' Agree an appropriate timescale for the employee to return their stress action plan with part 1 completed.
- v' On receipt of the completed stress action plan, arrange to meet with the employee without undue delay to discuss the plan.
- v' Following the meeting with the employee, complete part two of the stress action plan without undue delay and provide this to the employee for comment.
- v' Consider whether a referral to occupational health would be appropriate
- v' Set a review date to meet with the employee to review the stress action plan and progress.

### **Employee absent from work**

- v' If an employee is absent from work and the manager has been made aware that the reason for the absence is due to work related stress, the manager should ascertain from the employee whether the employee is fit to engage in a supporting health and wellbeing meeting in accordance with the Council's Supporting Health and Wellbeing Procedure to discuss their stressors at the earliest opportunity.
- v' Where appropriate enclose any previously agreed stress action plans along with a copy of the sample stress action plan, blank stress action plan and the information pertaining to the [HSE Management Standards](#) (LINK) with the meeting invite letter.
- v' If an employee advises that the manager is their stressor and they do not feel they are in a position to discuss this in detail with their manager, an alternative manager can be sourced to discuss this matter further.
- v' Depending on individual circumstances it may be appropriate to make a referral to occupational health following the supporting health and wellbeing meeting with the employee.

- v' Following the meeting with the employee, complete part two of the stress action plan without undue delay and provide this to the employee for comment.
- v' Complete the stress record of discussion form and forward it to the Employment and Payroll Team (and the Health, Safety & Wellbeing Team, if the stressors are work-related).
- v' If, the employee advises that they are not fit to engage in a supporting health and wellbeing meeting to discuss their stressors, the manager should inform the employee that a Supporting Health and Wellbeing Meeting will be arranged in accordance with the Council's Supporting Health & Wellbeing Procedure if it is likely that they will be absent for four weeks or more.
- v' If following the invite to the Supporting Health & Wellbeing Meeting the employee advises that they are not fit to attend, the manager should advise the employee that a [referral to occupational health](#) will be made to ascertain when it is likely that the employee will be fit to engage.
- v' If, due to the employee's health, the stress action plan cannot be discussed at the long-term sickness absence meeting, agree a date for a further Supporting Health & Wellbeing Meeting to be held.
- v' Set a review date to meet with the employee to review the stress action plan and progress.