

How To – Conduct Supporting Health and Wellbeing Meetings

Informal discussions between you and your employee regarding their health and wellbeing should be happening regularly, as part of 1-to-1 meetings or when an employee returns to work following an absence.

Managers have discretion when to move to the formal process under the Supporting Health and Wellbeing Procedure, however it is expected where an employee is off long term that an initial meeting takes place no later than five weeks after the start of the absence (as reasonably practicable). For prolonged sickness absence more than one meeting will be required.

The purpose of Supporting Health and Wellbeing meetings may include the following depending on individual circumstances:

- Exploring the reasons for the employee's absence, including actions taken by the employee.
- Offering support mechanisms if appropriate/reasonable.
- Identifying and discussing any recognisable pattern of absence, and its potential/actual impact on the team.
- Consider advice already provided through the Fit Note, requesting advice from Occupational Health service (OH) as required.

These meetings are to ensure communication is maintained and support is provided during absence; return to work is facilitated, where necessary, and formal action is taken if the employee cannot return to their post or the absence levels cannot be sustained by the service.

Key activities for managers to undertake when conducting the meeting are:

Gather any required information in advance:

- ✓ Full absence details (this may be 12 months to 2/3 years to obtain a full profile), and dates, length of absence and reasons.
- ✓ Check whether Fit Notes run consecutively – if they do not, question the employee at the meeting for the missing paperwork (as unauthorised absence will constitute a break in service).
- ✓ Correspondence relating to previous or current sickness absence (from the employee's personal file) including Occupational Health report(s). (from MyView or the Employment and Payroll Team).
- ✓ Consider implications under the Equality Act relating to disability; (Occupational Health advice may be required);
- ✓ Information about half or no pay, as appropriate [Occupational Sick Pay](#).
- ✓ In exceptional circumstances employees may bring an additional support e.g. family member/health worker. This needs to be agreed in advance.

Introductions

Open the meeting and make introductions that include:

- Those present
- Where present, clarify the role of the representative/work colleague
- Explanation of the format of the meeting

Explain the purpose of the meeting

Clarify that the purpose of the meeting.

It may be to review attendance levels, to review support and whether to take further formal action, or, it may be to discuss or review (if a further meeting) current sickness absence.

Discuss sickness absence

- ✓ Establish or review the reason for the absence, progress, ongoing treatment and likely duration/return to work (if appropriate).
- ✓ Present the information gathered prior to the meeting (e.g. sickness absence history), if appropriate.
- ✓ Offer or review support arrangements.
- ✓ Establish if the absence is work or stress related [Occupational Stress Procedure \(Link H&S Page\)](#).
- ✓ Agree what information will be sent to the employee to ensure that they are kept informed of developments within the Council, Service and/or team.
- ✓ Agree ongoing communication arrangements, if a return date is not known.
- ✓ Discuss or review any actions already taken (including by the employee) to facilitate a return to work.
- ✓ Sensitively assist the employee to respond to questions. Use constructive ways to encourage the employee to be forthcoming:
- ✓ Ask direct questions • Listen carefully • Be prepared to wait for a response
- ✓ If applicable, provide details of when half pay/ no pay commences.

If advice from Occupational Health is required (e.g. return to work arrangements/ reasonable adjustments, occupational impact of medical condition, likely length of absence, ill health retiral, Health Capability Transfer) explain that you will be making a referral to the Council's [Occupational Health Service](#). This may mean asking the employee to complete a referral.

- ✓ The meeting should be adjourned at this point and reconvened to discuss future action following receipt of the Occupational Health report.
- ✓ Ensure the employee understands the impact their attendance is having upon the delivery of the service (this needs to be handled sensitively).

Evaluate the Evidence and Decide Upon Action

Formal action should only be considered when an employee is back at work (with the exception of capability transfer or dismissal which would require HR involvement).

- ✓ Allow the employee and/or their representative or work colleague to make any further comments before a decision is taken on future action.
- ✓ Adjourn the meeting if necessary, to evaluate the information and explanations provided.
- ✓ Evaluate the information and discussion and decide what further formal action to take, using the [Checklist of Factors to Consider](#).
- ✓ Decide upon the timescale for formal action using the [Checklist of Factors to Consider](#). Consider what the appropriate level of absence should be i.e. should this be based on the levels of absence considered to impact on service delivery as outlined in the Supporting Health and Wellbeing Procedure, or whether the timescale for improvement should be reduced to effectively manage the impact i.e. 6 months Improvement Stage– Half of what the Council’s levels of absence considered to impact on service delivery over a 12 month period i.e. 2 or more occasions amounting to 2 or more working days or a total of 3 or more working days.
- ✓ Please note: the expected Improvement Stage may be adjusted where the employee is or is likely to be covered by the Equality Act 2010 whilst giving consideration to the impact on Service Delivery.

Agree and/or Explain Future Action

The outcome of the meeting will be one or a combination of the following, depending on individual circumstances.

- Reasonable adjustments and a plan for implementation agreed or reviewed.
- Referral to Occupational Health, if required, and an explanation of the referral process and next steps.
- Return to work plan agreed or reviewed.
- Stress action plan agreed or reviewed.

- Date of review meeting agreed.
- Explanation of the next steps if absence levels should continue.
- A formal Improvement Stage or Final Improvement Stage during which the expected improvement in attendance levels will be outlined, and an explanation of the next steps.
- Health Capability Transfer (only if recommended by Occupational Health).
- Referral to a Health and Wellbeing Hearing.

Future action depends upon whether the employee is likely to return to work in the near future or whether there is a reasonable likelihood that the employee will **not** return to work.

If employee is likely to return to work or is already at work:

- ✓ Agree further support, if required, and how this will be taken forward.
- ✓ Agree action the employee will take, if any, and note any timescales.
- ✓ If return to work timescale is imminent, discuss and agree Return to Work options and plan.
- ✓ If there is no imminent return to work date and the length of absence can be sustained, agree next meeting date and ongoing communication arrangements. Advice may be obtained from Occupational Health about the likely length of the absence and possible return to work date.
- ✓ Explain the formal action being decided upon, and the timescale over which an improvement in attendance is required, is appropriate.
- ✓ Ensure the employee understands the expected level of attendance.
- ✓ Explain the steps in the Supporting Health and Attendance Procedure if there are no significant and sustained improvement in attendance levels.
- ✓ If a Final Improvement Stage is issued, ensure that the employee understands that continued poor attendance will result in their dismissal.

If there is no reasonable likelihood that the employee will return to work:

- ✓ If applicable, discuss the possibility of a Health Capability Transfer.
- ✓ If applicable, discuss the possibility of ill health retirement (if the employee is a

member of the pension scheme).

If not already obtained, explain that Occupational Health advice will be required for both courses of action.

v' If on receipt of Occupational Health advice, the likely return to work is too far in the future or has been too prolonged for the Service to sustain, consideration may be given to the employee's continued employment. Advise the employee that a Health and Wellbeing Hearing is required.

v' Note: if dismissal is being considered, a Senior HR Officer must be in attendance at this meeting and at the Hearing.

v' Where the illness is terminal contact the Employment and Payroll Team as soon as known so that the most appropriate pension options for the employee can be determined.

Next Steps

v' Send letter to employee confirming the meeting, without unreasonable delay and upload a copy to the employee's personal file on [MyView](#).

v' Include a [Return to Work Plan](#) , if appropriate. Also upload to MyView.

v' If necessary, make an [Occupational Health Referral](#).

v' Obtain or arrange further advice or support as required.

v' Note next steps in your diary (e.g. next meeting/return to work date, end of Improvement Stage). Note if in exceptional circumstances a Final Improvement Stage is issued, the next step will be a Health and Wellbeing Hearing.

Each contact must be handled sensitively, and due consideration must be given to the nature of the employee's illness. The manager must arrange the meeting according to [How To - Arrange Formal Meetings](#).

