

Supporting Attendance Toolkit SA05: Short- & Long-Term Absence Stages (Version: 2.0)



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Version Number	Effective Date	Details of Last Revision
1.0	21 June 2021	n/a
2.0	April 2024	Added to Section 1 – Industrial Injury Absences
		Added to Section 2 - First 2 weeks of sickness absence due to Bereavement for Close

Relationships (as defined in Special Leave Policy) will be discounted for the purposes of the formal absence triggers.
Added to Section 2c - Reference to considering discretion where there has been an improvement in attendance in conjunction with other circumstances
Added to Section 3 – Reference to the requirement to still hold the relevant FARM where the employee returns from long term absence as a formal absence trigger will have been met unless a FARM has already taken place during the course of the absence as that will have addressed the trigger. Discretion may be applied
Added to Section 3(a) – The timescales in the policy for long term meetings should not be treated the same as fixed formal triggers, but rather a prompt to invoke action, particularly where the Equality Act applies. Formal meetings for long term absences can be delayed or take place earlier were appropriate without the need to apply for discretion
Added to Section 3(b) – Reference to Template letter SA04(c) – Record of Attendance Support Meeting Letter, that can be used rather than the pro-forma (SA04(b))

Section 1: Short- and Long-Term Sickness Absence Procedure

The purpose of the procedure is to address and resolve issues of sickness absence in a structured setting with the overall objective of improving attendance to an acceptable level. In pursuit of this objective, the employee shall be supported wherever possible.

Both short- and long-term sickness absences will be managed thorough a 3-stage formal process which a manager must follow. There is a difference in when the formal stages are instigated and the outcomes that apply to each stage, however ultimately whether the absence is short or long term the sustainability of an employee's attendance levels will be the deciding factor.

To assist managers this procedure has been split into two sections: Dealing with Short Term Absence and Dealing with Long Term Absence.

This process must also be followed where it has been determined that the employee's absence is due to an industrial injury as this is still considered to be a sickness absence. However, where the council are proven to be at fault the absence will be discounted for the purposes of the absence triggers. Further information on the Industrial Injury process can be found in Section 5.7 of the Supporting Attendance Policy and associated guidance on Industrial Injury/Disease.

Section 2: Dealing with Short Term Sickness Absence

This process begins with the Return-to-Work discussion which the manager must arrange after every sickness absence. Thereafter, the manager will be expected to review the employee's sickness absence levels and take appropriate action based on the triggers set out below.

It should be noted that the first 2 weeks of sickness absence due to bereavement for Close Relationships (as defined in the Special Leave Policy) will be discounted for the purposes of the formal absence triggers. Managers should still monitor the frequency of these types of absence and address any concerns with the employee.

3 occasions of sickness absence in a rolling 12-month cycle, or 8 days or more cumulative absence of 2 working weeks.
↓
Stage 1 Formal Attendance Review Meeting (within 2 weeks of return)
③ occasions of sickness absence in a rolling 12-month cycle, or 8 days or more cumulative absence in a rolling 12-month cycle, or A continuous absence of 2 working weeks.
↓
Stage 2 Formal Attendance Review Meeting (within 2 weeks of return)
↓
③ occasions of sickness absence in a rolling 12-month cycle, or A continuous absence of 2 working weeks.
↓
Stage 2 Formal Attendance Review Meeting (within 2 weeks of return)
↓
③ occasions of sickness absence in a rolling 12-month cycle, or 8 days or more cumulative absence in a rolling 12-month cycle, or 8 days or more cumulative absence in a rolling 12-month cycle, or 8 days or more cumulative absence of 2 working weeks.
↓
③ occasions of sickness absence in a rolling 12-month cycle, or 8 days or more cumulative absence in a rolling 12-month cycle, or 8 days or more cumulative absence of 2 working weeks.
↓
③ Stage 3 Capability Meeting

Section 2 (a): Stage 1 and 2 – Formal Attendance Review Meeting

Following the return to work, where an employee's absence has reached a trigger point within a rolling 12-month period as set out in Section 2.6 of the Supporting Attendance Policy and Procedure they should be advised that they will be met under either Stage 1 or Stage 2 of the formal supporting attendance procedures, depending on what stage the employee is at in the process.

The meeting should be held as near to the last day of absence, allowing for the employee to be given at least 5 working days' notice of the meeting. It is expected that these meetings should be held within 4 weeks of a return. There must be a valid reason for meetings taking place out with this timescale e.g. annual leave, unavailability of union representative

As noted above the employee should be given at least 5 working days' notice of the meeting. This applies to all meetings under this procedure. A template letter (SA05 (a)) is available inviting the employee to the meeting. The employee's absence record should also be attached to the invite letter.

A common-sense approach should be taken to ascertain when it would be unreasonable to meet an employee under this procedure, despite hitting the absence triggers, for example, where an employee's absence is directly attributable to a specific illness or recovery from a recent operation. In this instance the Stage 1 or 2 meeting may be postponed for a reasonable time to allow the employee to make a full recovery and discretion may be applied from Stage 2 onwards if appropriate (please see Section 2.9 of the Policy for further guidance on this).

The 1st and 2nd stage meetings are designed to ensure the employee is aware of the seriousness of their poor attendance and to discuss in a formal setting, ways that this can be improved. This is not a disciplinary hearing. It is important to emphasise that all sickness absences from work are treated as genuine. (Any question that the absence is not genuine should be dealt with under the Council's Disciplinary Policy and Procedure). It is the effect and impact of the absence on the workplace and contractual obligations that is being addressed. The reasons for sickness absence allow exploration of options available to support the employee to improve attendance.

It is essential that the employee fully understands in what respect their attendance is unsatisfactory and that they are given an opportunity to explain any contributing difficulties to this situation. The employee will also be advised that if attendance does not improve or there is a recurring pattern of sickness absence, they will be referred to the next stage of the procedure.

If the employee is called to a Stage 2 meeting the discussion and considerations at the meeting should cover the offers of support and explanation of the effects of the absence as per the Stage 1 meeting.

If the employee cites an underlying health problem as the cause of absence, then an Occupational health referral should be sought before determining what action to take. Further information on the Occupational Health Service and referral process can be found in the Supporting Attendance Toolkit SA08.

Section 2 (b): Stage 1 and 2 Attendance Target

The employee should be advised that they are in a fixed monitoring period for the next 12 months and will be called to a Stage 2 meeting if they have 3 occasions of sickness absence, 8 days or more cumulative absence or a continuous absence of 2 working weeks in the 12 months from the date of the last day of absence.

The employee's attendance should be closely monitored over the 12-month period and the manager should address any concerns as they arise.

A Stage 1 or 2 outcome letter must be issued to the employee as soon as possible after the meeting. Template letters - SA05 (b1) and SA05 (b3) are contained in the Supporting Attendance Toolkit.

Section 2 (c): Requesting Management Discretion

Managers can request for discretion to be applied from Stage 2 of both the short- and long-term process. This can only be applied once during the formal process. Discretion is subject to certain criteria being met and requires to be supported by a Senior Manager/Head of Service and Employment & Policy.

The manager may have enough information to make the request ahead of the Stage 2 meeting, however the meeting should still be arranged to discuss the outcome of the request and what it means in terms of the employees' journey through the absence stages.

If the manager receives information at the Stage 2 meeting that allows him to consider making a discretion request the meeting should be adjourned and re-convened once the outcome of the request is known. The employee should then be advised as to what stage of the process will be applied to them.

Where an employee is already on Stage 1 of the process and hits another trigger managers should consider any significant improvement in attendance (in conjunction with other circumstances i.e. disability related absences, bereavement absences) when considering applying discretion. Particularly where the employee is within the last month or so of the monitoring period.

If discretion is applied the employee would either remain on Stage 1 or Stage 2 depending on where they were in the formal process and a further monitoring period may be applied. Further information on Management Discretion is contained in the Supporting Attendance Toolkit – SA06 – Management Discretion Procedure.

Section 2 (d): Stage 3 - Capability Meeting – Short Term Absence

The third stage meeting is normally the final stage, unless discretion is applied, and may result in the employee being dismissed or redeployed to an alternative post if it has been determined, through a referral to occupational health that they are not fit to undertake their current role due to an underlying health condition. When dealing with short term unrelated absences a referral to Occupational Health is not necessary, however advise should be sought from the Employment & Policy team on this.

To assist in determining whether or not an employee should move to the third and final stage of the procedure, a review of the case must be undertaken by the manager in discussion with Employment & Policy to ensure appropriate action up to that stage has been taken.

The Manager should complete the Stage 3 Case Review Checklist (SA05 (i)) as far as possible ahead of this review with an Employment & Policy adviser. If the Stage 3 meeting is being dealt with by a more senior manager, they must undertake the review of the case.

Employment & Policy must attend the Stage 3 meeting; however, they can provide support an earlier stage if required. A template letter (SA05 (e)) is available to invite the employee to the meeting.

If the employee has cited an underlying condition as the cause of their short-term absence an occupational health referral must be made at this stage if not already made.

The Manager must consider all aspects of the case before reaching a decision including whether to apply discretion or not. Where the unsatisfactory attendance record has continued and the improvement has not been achieved or sustained, and, unless there are grounds for discretion (see Section 2(c)) or other mitigating circumstances the Manager shall have the authority to terminate the employee's employment on the grounds of capability due to unsustainable levels of attendance.

Where the employee is dismissed on the grounds of capability due to unsustainable levels of attendance, he/she must be advised of the outcome in writing, using the template letter (SA05(f)), within 10 working days and informed of their right to appeal against the decision of dismissal. Please see Section 2.10 of the Policy for further information on appeals.

Section 3: Dealing with Long Term Sickness Absence

Research indicates the best support for employees with long term absence is through early and continuing absence discussions. This procedure has been designed to ensure that managers keep in contact with absent employees throughout the duration of their absence, continue to offer and discuss support mechanisms, and advise the employee of the action that may be taken should their absence continue.

The procedure below does not replace the need to act where an employee has reached an absence trigger as detailed in Schedule A – Terms and Conditions of Employment.

Where an employee returns to work from long term absence, they will have at the very least reached the 2 weeks continuous absence trigger (and perhaps other triggers depending on previous absences). Therefore when the employee returns to work, if no Formal Absence Review Meeting has taken place during the course of the absence the relevant Stage Formal Absence Review Meeting must still be held.

It is important that this takes place to ensure the employee understands what is expected of them in terms of their attendance and that their absence levels will be monitored. Discretion to the outcome of the meeting may be applied where appropriate.

Where the relevant Stage meeting has taken place during the absence, at the return-to-work discussion employees should be reminded of what stage of the absence process they are still on and that their absence will continue to be monitored for a further 12 months.

Some examples are outlined below:

Example 1

- Employee on Stage 1 prior to long term absence
- Absent for 6 weeks therefore has reached 2 weeks continuous absence
- Stage 2 FARM should be held
- Discretion can be applied if appropriate

Example 2

- Employee not on any stage
- Absent for 11 weeks therefore has reached 2 weeks continuous absence
- Stage 1 FARM should be held

Example 3

- Employee absent for 19 weeks not on any stage
- Stage 1 Meeting held at Week 10 of absence
- Stage 2 Meeting not held at 13 weeks
- Employee returns to work no formal action required
- Employee remains on Stage 1 and should be reminded of the monitoring period in regard to this

Section 3 (a): Contact during Long Term Sickness Absence

When an employee is absent from work due to long term sickness it is important that contact is maintained throughout to aid in supporting the employee. The responsibility to maintain contact rests equally with the employee and the manager.

Employees should be reminded of the Councils Notification & Certification procedures at the start of any absence (see Section 5.1 of the Policy for further information) and must be advised that they should remain contactable during periods of absence and respond to letters and other communication i.e. phone or video calls.

Managers should keep in contact to gain an understanding of when the employee expects to be back at work and any support the Council can provide to assist their recovery, as well as any work-related matters and the possibility of working for example, from home to maintain contact with the workplace. The amount of contact will depend on the reason for absence and a balance of reasonable contact is expected from both the employee and the line manager.

Employees should also be advised an early stage that should their absence be anticipated to reach 4 continuous weeks, then an Attendance Support Meeting will be arranged between 3 and 4 weeks of the absence and if there is no return before 8 weeks a Stage 1 Formal Attendance Review meeting will be arranged in accordance with the Supporting Attendance Policy and Procedure.

Long term absence cases will be considered on their individual circumstances, and where applicable taking the requirements of the Equality Act 2010 into account (see section 4.2 of the policy). The procedure to be followed is set out below.

Please note that the timescales for carrying out the formal meetings for long term absences should not be treated as fixed formal triggers, rather a prompt to invoke the relevant action. As long as managers are consistent in their approach the formal meetings can be delayed, were appropriate, particularly where the Equality Act may apply, without the need to apply for discretion as long as the delay is within a reasonable timescale and there is sufficient justification for this.

Continuous absence that is anticipated to exceed 4 working weeks i.e. 29 Calendar Days (pro-rata for part time employees) Attendance Support Meeting (between 3 – 4 weeks) ↓ Stage 1 Formal Attendance Review Meeting (8 weeks) (if employee returns before 8 weeks a Stage 1 meeting must still be held as they will have met the 2 weeks continuous absence trigger) ↓ Attendance Support Meeting (if required) ↓ Stage 2 Formal Attendance Review Meeting (13 weeks) ↓ Attendance Support Meeting (if required) ↓ Attendance Support Meeting (if required) ↓ Stage 3 Capability Meeting (*between 24 – 36 weeks) *this may take place earlier or later depending on the circumstances of the case

Section 3 (b): Attendance Support Meeting

As a minimum manager should arrange an attendance support meeting when it is anticipated that the employee will be absent for more than 4 weeks. Managers should try and arrange the meeting within 3 to 4 weeks of the absence. In the case of hospitalisation, the meeting should take place as soon as is reasonable. The meeting can take place at a Council building, at the employee's own home, an alternative mutually acceptable venue or over the telephone, depending on the employee's illness

This meeting should be positive and constructive and can be done on a one-to-one basis as it is informal. However, employees should be advised at this stage that if their absence continues a Stage 1 Formal Attendance meeting will be held either because they have reached 8 weeks of a long-term absence, or if they return before the 8 weeks, they will have hit an absence trigger of 2 weeks continuous absence.

Managers can also hold this meeting if an employee's short-term absence is giving cause for concern, but formal action is not yet warranted.

Following this meeting a referral to Occupational Health must be arranged if this has not already happened.

A record of the meeting and any agreed actions should be provided using either the pro-forma (SA04(b)) or the template letter (SA04(c)). A copy should be provided to the employee. Please see SA04 Conducting an Attendance Support Meeting for further information.

Section 3 (c) Occupational Health Referral

The manager must give serious and immediate consideration to the employee being referred to the Council's Occupational Health service as early as possible in the supporting attendance process. In any event a referral must be made in the following cases:

- After a continuous absence of 4 working weeks or earlier if the manager deems it appropriate to do so
- When an employee has advised that the reason for their absence is work related stress (a referral in these circumstances should only be made either once the work-related stress assessment has been completed or an attempt has been made to complete it)
- When an employee has advised that they have an underlying condition that is impacting on their ability to carry out some or all of the duties of their role.

The primary purpose of the referral and resulting advice report is to provide managers with up to date professional medical and, occasionally, specialist information to enable them to effectively manage the overall attendance of their employees in line with the Supporting Attendance Policy & Procedures.

Further information on the role of occupational health and the referral process, is contained in the Supporting Attendance Toolkit – SA 08 – Occupational Health Service and Referral process.

Section 3 (d): Stage 1 Formal Attendance Review Meeting (8 weeks)

Long term absence is operationally difficult, and it is appropriate to review the case and ensure an up-to-date Occupational Health report is available **or** to establish with the employee that there is no change to the employee's health status since any recent report. The Stage 1 meeting should be arranged (template letter SA05 (c)) at or around 8 weeks of continuous absence. Cases will vary depending upon the nature of the medical problems and the prognosis of the employee's condition. The meeting will consider:

- Previous discussions with the employee about their absence and health.
- the latest OH report if available and the employee's current and future medical prognosis.
- Any support available, such as phased return, amended duties, change in hours, home working, redeployment.

If the employee or the Occupational Health report indicates that the employee will be fit to return before Stage 2 of the process would be instigated (13 weeks absence) then an attendance support meeting may be arranged to discuss the employee's progress prior to the expected return date and agree a return-to-work plan.

If the expected date of return is unknown or the employee is going to be absent for longer the employee should be advised that a Stage 2 Formal Attendance Review Meeting will be arranged once the absence reaches 13 weeks. An attendance support meeting can still be arranged in the interim.

A Stage 1 outcome letter must be issued to the employee as soon as possible after the meeting. A template (SA05 (d1)) is contained in the Supporting Attendance Toolkit.

Section 3 (e): Stage 2 Formal Attendance Review Meeting (13 weeks)

Managers must ensure that an up-to-date Occupational health report is available before holding a Stage 2 meeting or establish with the employee that the latest report reflects the current health status of the employee. The 2nd stage meeting should normally be arranged (template letter SA05(c)) at 13 weeks continuous absence. The following should be discussed:

- Summary of discussions at Stage 1 of the process.
- Update on the employees current and future medical prognosis including a likely return to work date.
- Whether there are grounds for discretion to be requested and applied, see below for further information on this.
- Whether any reasonable adjustments are required (see section 4.2 of the policy).
- Any feasible redeployment options and encourage the employee, if appropriate, to register on the Council's redeployment list.
- Whether III health retirement is an option check first if employee has been in the Local Government Pension Scheme for at least 2 years the decision as to whether the employee should be granted III Health retirement lies with the employer based on advice from the Occupational Health Physician. Not every employee who is absent long term will be considered for III Health retirement (further information on ill health is contained in the Supporting Attendance Toolkit SA 09).
- The employee should be informed that cases of significant long-term absence cannot be sustained indefinitely and if there is no prospect of a return to work in the foreseeable future or ill health retirement, a Stage 3 Formal Attendance Review Meeting will be arranged to consider dismissal due to capability on the grounds of ill health.

Clarify when the employee will commence half or no pay and discuss use of annual leave if appropriate. If a return to work is not planned and the employee remains, they must be advised that a Stage 3 Formal Attendance Review Meeting will be arranged between 24 and 36 weeks of their continued absence to consider whether the Council can sustain their employment.

A Stage 2 outcome letter must be issued to the employee as soon as possible after the meeting. A template letter (SA05 (d2)) is available.

Please note in the exceptional circumstances that the Stage 2 meeting has not taken place at or around the 13 weeks, and there is no agreement to delay this, managers cannot proceed with the long-term stage 2 meeting if the employee has then returned to work. The employee would either remain on Stage 1 of the Supporting Attendance process or a Stage 1 meeting must be arranged on their return as they will have, at least reached the 2 weeks continuous absence trigger.

Section 3 (f): Phased Return to Work

Where Occupational Health has advised that that a phased return would be beneficial the Council will normally support a structured phased return for up to a maximum of four weeks (pro-rata as applicable). If recommended by an appropriate health professional e.g. occupational health, GP that longer is required up to a maximum of 6 weeks may be given.

Further information on phased returns is contained in Section 4.1 of the Supporting Attendance Policy & Procedure.

Section 3 (g): Stage 3 Capability Meeting (24 to 36 weeks)

Following the completion of the Stage 1 and Stage 2 meetings, cases of continuing long-term absence will be referred to a Stage 3 Capability Meeting (template letter SA05(g)). The purpose of the Stage 3 meeting will be to consider whether there are any further actions that the Council can take to assist the employee in returning to work or, whether employment should be terminated due to the employee's continuing incapability to undertake their duties effectively because of their ill health.

Prior to the Stage 3 meeting being arranged, a review of the case must be conducted to assist in determining whether an employee should move to the third and final stage of the procedure. This review should be undertaken by the manager dealing with the absence at Stage 3 in discussion with Employment & Policy to ensure appropriate action up to that stage has been taken.

The Manager should complete the Stage 3 Case Review Checklist (SA05 (i)) as far as possible ahead of this review with an Employment & Policy adviser. If the Stage 3 meeting is being dealt with by a more senior manager, they must undertake the review of the case.

The case review should consider.

- Is there up-to-date medical advice in the form of an OH report or any other specialist advise.
- Details of previous meetings held.
- Details of any other arrangements made by the Manager to support the employee back to work.
- Details of discussions on adjustments, phased return, redeployment etc.
- Ill Health Retirement, if appropriate and not already explored.
- Any issues raised or comments expressed by the employee or their representative.

Once the manager and Employment & Policy are satisfied that the process has been appropriately applied the employee can be invited to the Stage 3 Capability Meeting (template letter SA05(g)).

When reaching a decision about whether to dismiss, the Manager, in addition to the above, will consider all relevant information including the following.

- The impact of the employee's absence on other employees and service delivery.
- The employee's absence record and the Occupational Health advice received.
- Representation made by the employee and/or their representative.
- Actions have been taken/considered to enable the employee to continue in employment.
- Whether discretion should be requested and applied if this has not already been applied at the previous stage.

Where the manager deems it appropriate to request discretion, the Stage 3 meeting should be adjourned and re-convened once the outcome of the discretion request is known. Further information on requesting discretion can be found in the Supporting Attendance Toolkit SA 06 – Management Discretion Procedure.

Where the employee is dismissed on the grounds of capability, he/she must be advised of the outcome in writing, using the template letter (SA 05(h)), within 10 working days.

The employee can appeal the Stage 3 outcome, and this must be detailed in the outcome letter (please see the Supporting Attendance Toolkit – SA07 for further information on the appeals process).

As with Stage 2 above where the Stage 3 meeting has not taken place prior to the employee returning to work, and this is not due to an agreement to delay this, managers cannot proceed with the long-

term stage 3 meeting if the employee has returned to work and the employee would remain on Stage 2 of the Supporting Attendance process.

Section 4: Combination of Short- and Long-Term Absence

Short Term to Long Term Absence

Where an employee is already on stage one or two for short term absence, who then becomes absent for a period stretching into long term (usually indicated by the medical certificate) managers should review the employee's absence record, the reason for absence and consider a referral to Occupational Health prior to a review meeting to help determine when and how to proceed with the next stage meeting.

Progression through the long-term process should not be expedited simply because of previous short-term absences. The employee must still be given reasonable time to recover, particularly where the Equality Act may apply. However, the timescales for the formal meetings can take place earlier than normal, if appropriate, taking account of the employees' attendance levels and any discretion or adjustments to the process that have already been applied.

Long Term to Short Term Absence

Sometimes employees may have been off long term and then return to work but reach the next stage with a short-term absence. Managers should consider the reason for absence and whether it is connected to the previous long-term absence, in which case it may be appropriate to refer to Occupational Health prior to a review meeting to help determine when and how to proceed with the next stage meeting.

In any event progression through the stages will continue either under the short- or long-term process depending on the combination of the absences.

Examples:

- Employee is on Stage 1 of the short-term process and then occurs a long-term absence of 6 weeks. They will progress to Stage 2 of the short-term process as they will have returned to work and reached a trigger.
- Employee is on Stage 2 of the long-Term Process and then occurs short term absences that means they reach a trigger. They will progress to Stage 3 of the short-Term process.
- Employee is on Stage 2 of the short-term process and then is on long term absence with no sign of a return. They will progress to Stage 3 of the long-term process. As stated above the timescales for when the Stage 3 meeting takes place can be adjusted taking all relevant circumstances into account. i.e. Stage 3 meeting could take place at Week 8 of absence or earlier if appropriate.

Where the above circumstances apply, managers may wish to seek advice from the Employment & Policy team before deciding on a course of action.

Section 5: Employment & Policy Support

Advice and guidance are available from Employment & Policy at any stage of this procedure. However, an Employment & Policy adviser is not normally required to be present at Stage 1 and 2 of this procedure regardless of whether it is due to short- or long-term absence. However advice and guidance can be sought at any point of the process.

Advice must be sought from Employment & Policy prior to a Stage 3 Capability Meeting (for both short- and long-term absence and in any event an Employment & Policy adviser will support the manager with the Stage 3 Case Review and will also attend the Stage 3 Capability Meeting.

Appendix 1: Stage 3 Case Review Checklist

SA05 (i) – Stage 3 Case Review Checklist

The Stage 3 - Capability Meeting is normally the final stage of the Supporting Attendance process, unless discretion is applied, and is likely to result in the employee being dismissed or redeployed to an alternative post if it has been determined that they are not fit to undertake their current role due to an underlying health condition.

To assist in determining whether or not an employee should move to the third and final stage of the procedure, a review of the case must be undertaken by the manager in discussion with Employment & Policy to ensure appropriate action up to that stage has been taken. This review must be done for both short- and long-term absence cases.

This form should be completed prior to the review discussion with Employment & Policy

Managers Detail	s						
Managers Name			Job Title				
Employment & Policy							
Adviser							
Employee Detail	S						
Employee Name			Employee No				
Job Title			Service/Division				
Date absence			Reason for				
commenced			absence				
Information to be consid	ered		ubschee				
Section A							
	rnoted and tick ves or n	o to eac	h question – wher	е			
Please consider the undernoted and tick yes or no to each question – where applicable information must be provided in Section B.				Yes	No	N/A	
1. Do you have an up to date OH report? (this should be no more than 6							
months old and provide sufficient information on the employee's current							
health situation?							
2. Was further medical evidence obtained from the employees GP and/or			/or				
specialist? This is essential where the Equality Act may apply)							
3. Have you considered redeployment?							
4. Is ill health retire	ment a consideration in t	this case	?				
5. Have you applied discretion previously?							
6. Have you offered	counselling support?						
7. Have you offered	physiotherapy support?						
8. Have you implemented any reasonable adjustments?							
9. Have you offered all support required to assist in this case?							
10. Have you applied all the required processes within the policy?							
Section B							
Please provide d	etails under each questi	on	1				
-	tendance Review date:						
(please attach Stage 1	outcome letter to this						
	form)						

Stage 2 Formal Attendance Review date:	
(please attached Stage 2 outcome letter to this	
form)	
Please provide a summary of discussions at	
Stage 1 and 2	
Please provide details of any specific issues or	
concerns raised by employee or representative	
at these meetings	
Please provide a summary of any Attendance	
Support meetings	
Please provide a summary of most recent OH	
report	
If applicable, please provide details on any	
redeployment considerations	
If applicable, please provide the outcome of the	
Ill Health assessment	
in reach assessment	
If applicable, please provide details of any	
discretion applied?	
If applicable, please provide details of any	
adjustments that have been made to date	
Please provide details of any arrangements you	
have made in support of this employee	

Any	other factors that y	ou have considered in managing this case		
	Section C – Decisi Following discuss the box below.		& Policy, please select yo	our decision by placing a tick in
1.	Proceed to Stage 3 – Capability (send invite letter (SA05 (e) – short term absence or (g) long term absence)			
2.	 Request/Apply discretion (the discretion request form must be completed and submitted to the relevant senior officer if this has not already been done) 			
	Date of Review:		Managers Signature:	