

# **Carrying Out a Return to Work Discussion**

## **Guidance**

# Guidance – Carrying Out a Return to Work Discussion

## Introduction

Return to Work Discussions are informal discussions which allow a manager and employee to discuss a recent absence to ensure that the employee is welcomed back to work, that they are fit to work and that they are aware of any work related developments they may have missed whilst absent. It is also an opportunity for both managers and employees to raise any concerns and to discuss and agree appropriate measures to address these concerns.

This helps managers to understand possible underlying factors at an early stage, allowing the opportunity for adjustments to be considered and implemented in good time. Equally, it also allows any manager concerns around attendance levels to be raised with an employee at an early stage to allow time for any required improvements to be made.

## The Type of Discussion

A return to work discussion should take place after every absence, regardless of the length of absence however the nature of the meeting may differ depending on the circumstances.

For example:

- For short term absences where no review point has been met or where the line manager has no other concerns around an employee's attendance levels, a short verbal discussion is appropriate with no need to complete a return to work form.
- Where a review point has been met or where a manager needs to raise a concern, it is normally appropriate to conduct a more structured (but still informal) return to work discussion, recording the discussion on the return to work form. A more thorough return to work discussion should also take place following long-term absences.

## When to Hold the Discussion

The return to work discussion should take place as soon as possible, preferably on the first day back following the absence. Where this is not practical, it should take place as soon as possible thereafter. Where only a short discussion is required (bullet point 1 above), a telephone discussion would be appropriate to assist in holding the discussion quickly (e.g. for employees working on other sites). It will normally not be appropriate to conduct a more structured discussion (bullet point 2 above) by telephone, however, exceptions may be made if this is the only way of carrying out a discussion timeously. In such cases, the Return to Work form may be completed/signed off retrospectively.

In all cases, the discussion should take place in private.

## **Preparing for the Discussion**

Managers should ensure that they have all the relevant facts and information in advance of the discussion and that they are clear about the areas that they wish to cover. This may include having to hand absence records, the Managing Attendance policy (e.g. to be able to refer to the Review Points), medical reports and/or previous absence related paperwork.

Ample time should be set aside so that the discussion is not rushed.

## **Conducting the Discussion**

At the outset of the discussion, the line manager should explain its purpose including the fact that it is routine to hold such a discussion in line with the Managing Attendance policy. Return to work discussions should be carried out in a sensitive and considerate manner, with the primary focus being on supporting the employee to sustain an acceptable level of attendance at work.

### *Where overall attendance is not a concern*

In cases of short-term absence where no review point has been met or where the line manager has no other concerns around an employee's attendance levels, the discussion will likely comprise a brief informal catch up discussion. This discussion will normally involve welcoming the employee back, checking that they have fully recovered and that there are no obvious problems and updating on any work related matters or events that they may have missed. Should any concerns or underlying medical conditions be raised during the discussion– this is a good time to begin exploring how they impact on or are impacted by work and jointly discussing possible adjustments which may be made to support the employee. A referral to Occupational Health may be useful, but is not essential, in order to help explore possible adjustments

A return to work form is not normally required in these circumstances, however, it would be prudent to keep any notes relating to discussion around adjustments.

### *Where attendance levels are becoming a concern*

Where a review point has been met or where a manager needs to raise concerns, a more structured (but still informal) return to work discussion should take place.

This discussion should cover the same key steps as above in terms of welcoming the employee back, checking they are fit to return and updating on work developments. In these circumstances however managers should also explore the following:

- Alerting the employee to the fact that their attendance levels are giving cause for concern
- Reasons for the latest absence (and previous absences which have contributed to reaching the Review Point(s) and any problems which may be a factor in the absence (e.g. underlying health conditions, work related factors, home/domestic matters etc). *In cases where it is identified that an underlying medical condition is impacting upon attendance discussion should take place to explore possible adjustments which may be made to support the employee. A referral to Occupational Health may be useful to obtain further advice in relation to possible adjustments.*
- Patterns of absence (e.g. where the absence tends to fall on the same days of the week/month, follows periods of annual leave etc)
- What is being done, or can be done to improve attendance? For example, is the employee taking any steps or preventative measures to reduce the likelihood of future absences? Are there any support interventions which can be put in place to improve attendance levels?
- Is it appropriate to obtain medical advice from Occupational Health?
- Where applicable, encourage the employee to participate in support available from other University services e.g. Employee Assistance Programme (including counselling), [Occupational Health](#))

Managers should then explain to the employee that their absence levels have reached one or more of the [Review Points](#) set by the University and ensure that the employee understands these.

At this point, managers should also explain the next steps in the process (if any) in line with the [Attendance Improvement Process](#). This will be different depending on the stage (Informal or Formal) so reference to the policy is important, but will typically involve a monitoring period in which the employee's attendance levels are expected to improve.

This discussion should be recorded using the [return to work](#) form which can both guide and record the discussion. Once signed off, the form should be kept for future reference.

#### *Where an employee returns from a long-term absence*

Where an employee is returning from long-term sickness absence it is possible that any support needs or workplace adjustments will have been identified and addressed prior to the actual date of return. However, this meeting will still give the line manager the opportunity to welcome the member of staff back, give any relevant workplace updates, and confirm any arrangements or modified work schedules that have been put in place to facilitate their re-integration back into the workplace.

In some long-term cases, a [Review Point](#) may still have been met. In this case, the appropriate approach should be followed as per the section above.

### **Key points for managers to note**

- Return to work meetings should be conducted in private, with sensitivity, and any concerns explored in a caring and concerned manner
- Approach matters with an open mind, and give the member of staff opportunity to explain the reason behind their absence
- Do not be judgmental, make assumptions about the absence, or attempt to give any advice that you are not qualified to provide
- Consider how the employee's absence level compares with other absence levels in the team, and ensure that all staff are treated in a fair and consistent manner