

APPENDIX 2

This checklist should be followed when a manager has cause for concern in relation to an employee's fitness to work and is considering a referral to

Informal Stage Meeting Checklist

Date:

Manager/Headteacher should complete this form once they have met with the employee in question.

The trigger points for the Informal Procedure are:

- x working days of sickness absence in any 12 month period
- 3 periods of sickness absence in any 3 month period
- A pattern of sickness absence
- 2 weeks' continuous sickness absence

(These amounts are pro rata for part-time staff)

This form can also be used when reviewing

- an employee with an unsatisfactory long term sickness/absence record
- development of a work related illness, mental health issues, a disability
- a review after a period of long term illness
- progression of an ill health retirement case

Employee
name:

School:

Manager/
Headteacher:

Dates of
absence:

Days'
absence:

Reasons
given for
absence:

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In the course of the meeting, the manager/Headteacher should cover the following areas:

- The manager/Headteacher's concerns, particularly in terms of the effect of the employee's absence on their ability to do their job and the effect on the team.
- Ways to address the problem. Has the employee been to see a doctor? (If there is any medical recommendation for future treatment, this should be discussed. The employee is however entitled to withhold any medical reports or information). Are there any underlying reasons for the absence – (work / domestic)?
- What standards of attendance will be required over a fixed period and how attendance will be monitored?
- Should the employee fail to achieve the set targets, what the next step will be (referral to occupational health and/or proceeding to the formal stage). The manager should explain the sickness procedure and what could happen if the situation doesn't improve in the long term (withholding sick pay / redeployment / dismissal).

Manager/Headteacher's meeting / discussion notes:

Monitoring period (weeks / months):

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Target:

**Signature of Head
teacher/ Manager:**