

BOLD FUTURES



Managing Sickness Absence Policy

Date policy last
reviewed:

Feb 2025

Signed by:

Headteacher

Date:

Chair of governors

Date:

Schools - Managing Sickness Absence Policy

1. Purpose

- 1.1 Bold Futures Federation is committed to promoting attendance at work and supporting the wellbeing of all employees. However, Bold Futures Federation recognises that there may be circumstances when an employee is genuinely unable to attend work due to sickness. If this happens, the employee will be treated fairly and sensitively.
- 1.2 This policy sets out actions all employees and managers must and should take when a sickness absence occurs so that this is reported correctly and so that the manager can support the employee on their return to work.
- 1.3 Where attendance falls below (or absence exceeds) the standard required the policy provides a framework for the manager to support the employee to reach the required level of attendance at work.
- 1.4 Bold Futures Federation recognises that poor attendance may have many causes. Bold Futures Federation expects managers and employees to use a range of resources available to support the employee to achieve the required level of attendance. However, where the required level of attendance cannot be achieved or sustained, this policy provides a framework for the line manager to appropriately manage the situation.
- 1.5 Bold Futures Federation is committed to providing a workplace where all employees are treated with dignity. Discrimination, bullying, harassment and victimisation is not acceptable, will not be tolerated and action will be taken. Appropriate management action may include formal action under the Managing Misconduct policy.
- 1.6 All employees must always adhere to the Managing Sickness Absence policy. The Managing Sickness Absence how to guide must be read in conjunction with this policy.

2. Policy Outcome

- 2.1 ensure employees and managers both understand the actions they must take when absence occurs.
- 2.2 ensure that, where attendance is not at the required level, the manager actively supports the employee to improve their attendance

- 2.3 Ensure that managers and employees are clear on actions they must take, and those that they should take, when attendance is not at the required level
- 2.4 Employees are treated with dignity and respect, however, reasonable action is taken when employees cannot achieve and/or maintain the required level of attendance at work.

3. **Scope**

3.1 This policy applies to:

- Teachers including Leadership, Upper Pay Range, Main Pay Range and unqualified teachers
- Support Staff

3.2 For the purpose of this policy the above staff groups are referred to as employees.

3.3 This policy is non contractual and does not form part of any employee's terms and conditions.

3.4 This policy does not apply to:

- Volunteers
- Contractors
- Agency workers

3.5 Employees that have been subject to a TUPE into Bold Futures Federation may be excluded from this policy if they are subject to express contractual terms and conditions of employment covering sickness absence management. In such cases, the employee should refer to their own contractual policies and procedures. Otherwise, they will be subject to this policy.

3.6 Employees with less than two years' continuous service with the employer must be managed under a shortened procedure as detailed in Appendix 1.

4. **How to use this policy**

4.1 This document provides guidance to employees and managers. Where the term 'you' is used, this refers to the manager.

4.2 The manager must refer to the How to Guide for full procedural information.

4.3 Employees are actively encouraged to contact their professional association/trade union representative at the earliest opportunity to obtain advice and support at any time.

5. **Reporting Absence**

5.1 An employee must report their absence to the line manager via locally agreed routes as soon as possible and prior to their normal start time.

5.2 Bold Futures Federation is responsible for recording the start and end dates of the absence to ensure that the payroll provider or payroll system is updated. This is essential to ensure that the employee is paid correctly.

6. **Actions during and immediately after all sickness absences**

- 6.1 The line manager and employee must engage in and maintain contact during periods of sickness absence.
- 6.2 The manager must contact the employee and complete a return-to-work interview following each occasion of sickness absence.
- 6.3 All parties involved in the managing sickness absence process must maintain confidentiality. This is both within and outside of Bold Futures Federation (including social media).
- 6.4 If any party does not maintain confidentiality, action may be taken under the Managing Misconduct policy.

7. **Part One – Unsatisfactory Attendance Procedure**

7.1 A manager must manage the employee's absence and determine when it is appropriate to take action under this procedure. The manager must review the employee's absence the first time a trigger is met and every absence thereafter which exceeds the trigger.

- A short-term absence trigger point in this School is considered as follows:
 - **6 working days* over two or more occasions in the past 12 months****
 - **9 working days* or 4 occasions (totalling 6 or more working days) in the past 12 months**
 - **whenever the level, frequency or pattern of absence causes a concern due to operational impact.**

**pro-rata for employees who work part time or in their first two years of service.*

***the previous 12 month period is calculated from the first day of the current absence.*

A long-term absence trigger is considered as follows:

- **28 calendar days or more on one occasion.**

The School may choose to apply an alternative trigger point. A Governing Body may wish to operate on different trigger points to those suggested above. In such cases, there will be a requirement to discuss and consult with staff and their representatives to seek their input prior to a governing body determination on trigger points. The School can exclude an absence for the purposes of the absence triggers and any action being taken under this policy at that time. This is a management decision. Each case will be treated separately and no precedents will be set.

- 7.2 When reviewing the absence, the manager must consider the circumstances of the absence, including whether the employee has a disability, or whether there are any extenuating circumstances. Extenuating circumstances [see [Part Two](#)] are normally excluded by the manager when considering if absence triggers have been met or exceeded. Each case will be treated separately, and no precedents will be set. If the manager decides it is not appropriate to review the absence at a stage in this policy, the manager should document the reasons for this.
- 7.3 The manager must decide whether it is appropriate to review the level of absence at a meeting with the employee under one of the following stages:
- management discussion
 - formal stage one - may result in a formal warning
 - formal stage two - may result in dismissal
- 7.4 For employees with less than two years' continuous service with the employer, managers must follow the procedure in Appendix 1.
- 7.5 The manager must give the employee a reasonable period to achieve the required improvement before moving to the next stage of the policy.
- 7.6 An employee may have a disability classified by the Equality Act 2010. In these circumstances you must refer to the Reasonable Adjustments guidance before taking action under this procedure.

8. **Management Discussion**

- 8.1 Reference must be made to the How to Guide - Managing Sickness Absence for the full procedural information.
- 8.2 The manager must discuss the absence with the employee. The manager should:
- Explain that the employee's attendance is below that which is required.
 - Explore the reasons for the absence including any health concerns, or broader issues that may be impacting on attendance
 - Explore any support that is required, ensuring the employee is made aware of sources of support [see section below]
 - Explore if any working practice or workplace changes that may support attendance can be accommodated.
1. If the employee has a disability, review any current Reasonable Adjustments to see if they need to be adjusted. Where there are none in place, explore whether there are any Reasonable Adjustments that are required and put these in place.
- Decide whether it is appropriate to put in place an Improvement Period. If so, set out what the employee must do to improve their attendance and within the Improvement Period.
 - Set out the consequences of the employee not achieving the required improvement in attendance within the improvement period.

- 8.3 The Management Discussion does not have to be a separate meeting. The Management Discussion may be as part of return-to-work discussions or normal management meetings. However, the manager should inform the employee that the discussion is a Management Discussion under this policy.
- 8.4 The manager must decide what action is appropriate.
- 8.5 The manager must continue to monitor absences; if the employee does not meet the standards set in the Improvement Period, the manager must consider whether to move to the next stage, A decision to move to the next stage can be made at any point within the Improvement Period. The manager does not need to wait to reach the end of the Improvement Period before making a determination to move to the next stage.
- 8.6 A record should be made of the discussion. The manager should share the record with the employee. A copy must be kept on the employee's personnel file.

9. **Formal Stages**

- 9.1 Reference must be made to the How to Guide - Managing Sickness Absence for the full procedural information.
- 9.2 Employees are actively encouraged to contact their professional association/trade union representative at the earliest opportunity to obtain advice and support at any time.
- 9.3 The employee has the right to be represented at a formal stage meeting [see [right of representation](#)].
- 9.4 At each formal stage of the policy, the manager must write to the employee to invite them to a meeting, giving 5 Working Days' notice.
- 9.5 The chair must hold a meeting with the employee at each formal stage of the policy.
- 9.6 A formal record must be taken during the meeting. For governor hearings in maintained schools, there remains a legal requirement to have a written record of the meeting of the Governor Panel.
- 9.7 The manager should schedule an alternative date for the formal stage meeting at the time of arranging the meeting. All reasonable efforts must be made by the employee and their representative/ work colleague to attend the first scheduled date. Where this is not possible due to availability, the alternative date will be used.
- 9.8 The manager and employee must exchange all relevant papers and supporting evidence in advance of the meeting. Management documents must be supplied with the invitation letter.
- 9.9 The employee or their representative must submit all relevant papers and supporting evidence to arrive with the Chair in advance of the meeting.
- 9.10 Where an employee is unable to attend a formal meeting due to ill-health, the manager must consider and make adjustments that are reasonable in the circumstances that would support them to attend. Adjustments such as, but not limited to, holding the meeting at a different location, allowing for regular breaks during the meeting, or allowing the employee to make written representations.

- 9.11 If the employee does not attend, the Chair will need to decide whether to continue in the employee's absence.
- 9.12 The Chair of the formal stage meeting must consider all evidence presented and decide on an outcome.
- 9.13 For employees with two or more years' continuous service with the employer, one potential outcome of a **formal stage one meeting** is that a Formal Warning is issued. If issued, the warning will remain live for the duration of the Improvement Period. The Improvement Period is specified by the Chair of the meeting. This is normally for a period of 12 months, but can be for up to 24 months, where appropriate. However, there are other potential outcomes, as listed below. This list is not exhaustive and depends on the circumstances of the employee's absence.
- No further action
 - In exceptional circumstances, to continue management discussions by extending the Improvement Period.
 - Set defined review periods, normally in the case of a long term absence
 - Additional support, training or workplace options such as working patterns or changes to the role
 - Reasonable adjustments if the employee has a disability
 - Medical redeployment
 - Seek input from Occupational Health
 - Ill health retirement, particularly in the case of long-term absence where the employee is eligible
- 9.14 For employees with two or more years' continuous service with the employer, one potential outcome of a **formal stage two meeting** is that the employee is dismissed. The dismissal of an employee on the grounds of ill-health should be a last resort. If the employee has a disability, any Reasonable Adjustments that have been identified must have been implemented. Potential outcomes of a formal stage two meeting include:
- A further period of review which is within the active period of the Improvement Period/warning issued at formal stage one
 - In exceptional circumstances, to extend the period of the Improvement Period/ Formal Warning
 - Mutually agreed ending of employment
 - Dismissal on the grounds of ill health
 - Medical redeployment
 - Ill health retirement (where the employee is eligible)
- 9.15 The Chair must confirm the outcome of formal meetings, which may either be verbally or in writing, and either on the day of the meeting, or at a future date. Where the outcome is being given after the meeting, the Chair must advise the employee

when the outcome is likely to be confirmed. Where an outcome has been given verbally, this must be followed up in writing, normally within 5 Working Days.

- 9.16 The manager must save a copy of the outcome letter on the employee's personnel file.
- 9.17 The employee only has the right to appeal against a decision at formal stage one, or formal stage two.
- 9.18 Any sums owing to Bold Futures Federation from the employee will normally be deducted from their final pay in accordance with their contract of employment.

10. **Appeal Stage**

- 10.1 Reference must be made to the How to Guide – Managing Sickness Absence for the full procedural information.
- 10.2 The employee has the right to appeal against the outcome of a formal meeting.
- 10.3 The employee must submit their appeal in writing within 10 Working Days of being informed of the outcome of the formal meeting. This must include the full reasons for the appeal.
- 10.4 The manager must write to the employee to invite them to a meeting, giving 5 Working Days' notice.
- 10.5 The chair must hold an appeal meeting with the employee.
- 10.6 A formal record must be taken during the meeting. For governor hearings in maintained schools, there remains a legal requirement to have a written record of the meeting of the Governor Panel.
- 10.7 The manager should schedule an alternative date for the formal stage meeting at the time of arranging the meeting. All reasonable efforts must be made by the employee (and their representative where they have one) to attend the first scheduled date. Where this is not possible due to availability, the alternative date will be used.
- 10.8 The manager and employee are required to exchange all relevant papers and supporting evidence in advance of the meeting. Management documents will be supplied with the invitation letter.
- 10.9 The employee or their representative must submit all relevant papers and supporting evidence to arrive with the chair in advance of the meeting.
- 10.10 The employee has the right to be represented at an appeal meeting [see [right of representation](#)].
- 10.11 Where an employee is unable to attend a formal meeting due to ill-health, the manager must consider and make adjustments that are reasonable in the circumstances, that would support them to attend. Adjustments such as holding the meeting at a different location, allowing for regular breaks during the meeting, or allowing the employee to make written representations.
- 10.12 The Chair must fully consider all evidence presented and decide on an outcome.
- 10.13 The outcomes could be;
 - To confirm the outcome of the formal meeting

- To change the outcome of the formal meeting, however the appeal cannot impose a higher sanction than issued at the formal meeting.

10.14 The Chair must confirm the outcome of the appeal, which may either be verbally or in writing, and either on the day of the meeting, or at a future date. Where the outcome is being given after the meeting, the Chair must advise the employee when the outcome is likely to be confirmed. Where an outcome has been given verbally, this must be followed up in writing, normally within 5 Working Days.

10.15 The manager must save a copy of the outcome letter on the employee's personnel file.

10.16 There is no further internal right of appeal.

11. **Part Two - Other Policy Requirements**

11.1 Reference must be made to the How to Guide – Managing Sickness Absence for further information relating to this section.

12. **Progression to a formal stage**

12.1 The manager can progress to a formal stage, or the next formal stage at the appropriate point if:

- The employee is failing to meet the requirements as set out in the Improvement Period as set following a Management Discussion, or as a result of a Formal Warning.
- The employee is unable to return to work.
- The employee's return to work programme has not been successful.
- the employee has not been successfully redeployed and/ or has refused a reasonable offer of alternative employment.
- There are no reasonable adjustments that can be implemented and/ or the reasonable adjustments that have been implemented have not been effective in improving attendance to the required level in the required timeframe.

12.2 In some exceptional circumstances it may be appropriate to move straight to Formal Stage two. This includes where the employee has been subject to repeated informal or formal action over a long period, that has not resulted in the required sustained improvement, or a period of long-term absence follows previous periods of short-term absence which have been managed at a Formal Stage.

13. **Right of representation**

13.1 Employees are actively encouraged to contact their professional association/trade union representative to obtain advice and support at any time.

13.2 The employee is not usually represented at any discussions within the Management Discussion stage of the policy. There may be circumstances, such as a Reasonable Adjustment when the employee asks to be represented and consideration should be

given to any requests. This should be accommodated where it does not cause a delay to the process.

13.3 The employee has the right to be represented at a formal meeting or appeal meeting by a trade union representative or a work colleague

13.4 It is the employee's responsibility to:

- arrange their own representative or work colleague
- liaise with their representative or work colleague to agree the formal meeting or appeal meeting date and time
- advise management of the representative's or work colleague's details.

13.5 There is no right to legal representation at any stage of this policy.

14. **Sick pay**

14.1 Entitlement to sick pay is detailed in an employee's terms and conditions of employment.

14.2 Where the employee's terms and conditions refer to 'normal' pay, this includes the employee's contracted hours, and, if applicable to their role, shift allowance, market supplements, first aid payment, Home Working Allowance and any enhancements paid on their contracted hours due to work undertaken at night or on a Sunday. It does not include sleep-in or standby payments if they were due to work these but could not, due to sick leave.

15. **Statement of fitness for work certificate**

15.1 A Statement of Fitness for Work certificate is required for absences of more than 7 calendar days. A medical practitioner will provide the employee with a Statement of Fitness for Work certificate. The employee must retain the original and provide a copy of the Statement of Fitness for Work certificate to the manager in a timely manner. The manager must ensure that the copy certificate is received and kept on the employee's electronic personnel file.

15.2 If the employee does not provide a Statement of Fitness for Work certificate when requested, they may lose their occupational sick pay entitlement. Action may also be taken under the Managing Misconduct policy.

16. **Medical Appointments**

16.1 An employee must obtain consent from their line manager if they are required to attend a medical appointment during work time.

16.2 The employee is not entitled to paid time off to attend planned dentist, doctor, or hospital appointments. Where possible, such appointments should be taken in the employee's own time unless it is covered by another leave provision.

17. **Planned operations**

17.1 An employee is responsible for notifying their line manager in advance of a planned operation. Operations are managed as sickness absence in the same way as absence for any other reason.

18. **Emergency operations**

18.1 If an employee has an emergency operation and is unable to attend work, they or a relative/ friend must notify the line manager at the earliest opportunity and in any event must do so within the first 7 days of the first day of their absence.

19. **Occupational Health advice**

19.1 In most cases, managers should be able to make decisions about workplace adjustments and support needed for employees without the need for a referral to Occupational Health.

19.2 Managers may seek Occupational Health advice on managing an employee's health situation and its impact in the workplace by using OH Guidance, Online signposting and resources. This may also include a referral to Occupational Health.

19.3 If an employee does not attend an Occupational Health appointment or does not co-operate with the referral, any assessment or decision taken will be based on the information available.

20. **Phased return to work**

20.1 In some circumstances it may be appropriate to consider a phased return to work. A phased return involves a temporary adjustment or adjustments to an employee's role. There is no automatic right to a phased return. A phased return will depend on the nature of the sickness absence and the employee's needs.

21. **Workplace and reasonable adjustments**

21.1 Adjustments should be considered to support an employee to remain at work to avoid sickness absence. These could be a range of adjustments, such as flexible working arrangements and ways of working. Additionally, if the employee has a disability, the manager must consider Reasonable Adjustments. Guidance is provided in the Manual of Personnel Practice.

21.2 Adjustments may be of a temporary or permanent nature.

21.3 Any adjustments must be discussed with the employee before implementing.

21.4 If adjustments cannot be accommodated because they are unreasonable, this will be managed under a formal stage two meeting.

22. **Redeployment**

22.1 Redeployment can be considered at any stage in this policy and should be considered as an alternative to dismissal:

- Redeployment should be focussed on a new role that removes the barriers currently being experienced in achieving the required level of attendance.
- The new role therefore should result in satisfactory attendance in that new role
- is subject to a suitable opportunity being available. It is the employee's responsibility to seek alternative employment.

22.2 Where redeployment is agreed by the manager, this will be on medical grounds.

23. Working whilst off sick

23.1 An employee may have more than one role with their employer. Due to the difference in the nature of the two roles, the employee may be on sickness absence from one role whilst still being able to work in the other role.

23.2 Where an employee is off sick from a role, they must not work in a second role, either for Bold Futures Federation, Hampshire County Council or another employer, during the normal working hours of the first role.

23.3 Where an employee has two (or more) roles with their employer, all roles are treated the same by HMRC. This means that Statutory Sick Pay (SSP) is paid on all roles for that employer. If an employee continues to work in one role, but is off sick in another, SSP cannot be paid at all. Where a school uses the IBC for payroll, if an employee submits an absence through ESS on one role, this is automatically applied to all roles held with that employer (for example all roles held in HCC community schools and HCC directorates are all under one employer). This means that SSP and Occupational Sick Pay is paid on all roles. The employee must contact the IBC if they are absent from one role but not others, to ensure their records are accurate. Failure to do so may result in an overpayment of SSP and/or reduction in pay in all roles to half/nil pay in accordance with the sick pay scheme. Schools that use other payroll providers should contact their payroll provider where the above applies.

24. Extenuating circumstances

24.1 Extenuating circumstances must be considered before taking any formal action under this policy. With the exception of pregnancy related illness, the decision that an absence, or part of an absence, is due to an 'extenuating circumstance' should only be made once the absence has been closed and the employee has returned to work. This decision should not normally be made to an open absence

24.2 This could include absence due to:

- An infectious disease including those notifiable to public health
- All Pregnancy related illness must be excluded. An employee may have pregnancy related sickness during the last four weeks before the expected week of childbirth. This will automatically trigger the start of the employee's maternity leave.
- Fertility treatment or related illness
- Gender reassignment

- Certified absence as a result of a recent bereavement – sickness absence in this context would normally follow a period of compassionate leave
- An injury sustained on duty whilst performing normal duties
- Where the absence is related to ongoing medical problems resulting from a previous injury in the execution of duty
- Absences relating to domestic abuse

24.3 Once a period of absence has been determined as an extenuating circumstance:

- that period of absence cannot later be redefined (unless clear evidence to the contrary emerges at a later date)
- the absence cannot be taken into consideration when assessing total days absence over a given period of time.

25. Absences arising from a disability

25.1 If an employee has a disability, managers must review whether there are any Reasonable Adjustments that could be implemented to remove the disadvantage created by the disability. If any are identified, these must be implemented. Managers should refer to the Reasonable Adjustments guidance in the Manual of Personnel Practice.

26. Health & Safety

26.1 Any Health and Safety issues must be dealt with in accordance with the relevant Health & Safety procedures.

27. Industrial Injury Sick Pay (EHCC)

27.1 Under the EHCC collective agreement, entitlement to sick pay is defined by the NJC Terms and Conditions for Local Government Services National Agreement ('the Green Book'). Details of the sick pay scheme can be found here: <https://extra.hants.gov.uk/employee/policy-guidance/sickness/sickness-pay>

28. Personal Accident Scheme (EHCC)

28.1 The Personal Accident Scheme provides benefits in respect of accidents occurring in the course of employment for employees on EHCC terms and conditions. Under Part D of this scheme, Employees on EHCC terms and conditions that are absent through industrial injury for longer than 6 months can claim for loss of earnings. Details of the scheme can be found here: <https://extra.hants.gov.uk/employee/policy-guidance/sickness/managing-sickness-absence>

28.2 If an employee that has less than 5 years' employer continuous service at the start of a period of sickness, has a prolonged period of absence, then they may contractually reduce to half or nil pay before they can claim under the Personal Accident Scheme. In these circumstances the Council will ensure the employee does not have a pay

reduction before they can claim under the Personal Accident Scheme. This is a non-contractual benefit and may be reviewed or withdrawn at any time.

29. **Industrial Injury (Teachers)**

29.1 Entitlement to sick pay is defined by Conditions of Service for School Teachers in England and Wales (the 'Burgundy Book').

30. **Instructions to leave work on health grounds**

30.1 In exceptional circumstances, an employee may be instructed to leave work where they:

- present as unwell or
- have a condition which poses a risk to them and/ or others or they are unfit to carry out their duties.

30.2 The employee will remain at home and receive their entitlement to occupational sick pay until it is appropriate for them to return.

31. **Mutual agreement**

31.1 As an alternative to a Formal Stage meeting the manager and the employee may discuss a mutual agreement. The contract of employment may be ended by mutual agreement between the employee and Bold Futures Federation.

31.2 There is no right to appeal a mutual agreement as it is entered into with the consent of both parties.

32. **Ill health retirement (IHR)**

32.1 To be considered for Ill health retirement, the employee must be in a pension scheme and be under the Normal Retirement Age.

32.2 Where an assessment of whether an employee meets the criteria for ill health benefits has been started, but is not yet complete, action to progress under formal stages of this procedure will normally be temporarily suspended pending the outcome of this decision. An assessment has been started once the employee has applied for ill health retirement benefits under the Teachers Pension Scheme, or the Approved Medical Practitioner has been requested by the employer to assess an employee under the LGPS.

32.3 **Employees in the Local Government Pension Scheme (LGPS):** If an employee who has applied for Ill Health Retirement has been unsuccessful, and is appealing this decision under the Individual Dispute Resolution Procedure (IDRP) Stage 1, then the following will apply:

- When a formal stage two meeting is convened, the panel will make a decision whether or not there are reasonable grounds for dismissal of the employee on the grounds of ill health capability.
- That decision, and the reasons for it will be communicated to the employee however, that decision will not take effect until the outcome of the IDRPs is known.
- Where the outcome of the IDRPs stage one is to not award Ill Health Retirement benefits, the panel's decision will be re-communicated to the employee along with contractual notice. Where the outcome of the IDRPs stage one is to award Ill Health Retirement benefits the panel's decision will no longer apply and the next steps will be communicated to the employee.

32.4 For clarity, the above steps only apply to appeals under IDRPs stage one where benefits have not been awarded at all. It does not apply where the employee is appealing the tier of benefits that have been awarded, nor to appeals under IDRPs stage two.

32.5 **Employees in Teachers Pension Scheme:** Appeals under the dispute resolution procedures for these schemes will not impact on any actions taken under this policy.

33. **Sickness during annual leave**

33.1 For Support Staff who do not work term time only – if an employee is sick during a period of annual leave, they are entitled to have their annual leave entitlement reinstated.

33.2 The principles of recording sickness absence will apply.

33.3 The principles of 'Reporting Absence' will apply.

34. **Sickness and accrual of annual leave**

34.1 For Support Staff who do not work term time only – annual leave will continue to accrue during sickness absence including during periods of half or nil pay.

35. **Referrals to professional bodies**

35.1 Some professions are required to be registered with a professional body in order to practice. There may be concerns about an employee's fitness to practice during or upon completion of the Managing Sickness Absence process. In such cases, there may be a duty to refer the employee to their professional body. It is the manager's responsibility make this assessment and action where necessary.

36. **Formal action – professional association/trade union representative**

36.1 Where there are concerns involving a trade union representative, advice must be sought from EPS before taking formal action.

37. **Definitions**

- 37.1 The policy uses '**must**' to set out actions that managers and employees must always take. The policy uses '**should**' to set out actions that should be taken by managers and employees, unless there is good reason not to.
- 37.2 **Working Days** - Monday to Friday, excluding bank holidays or public holidays.
- 37.3 **Health conditions without sickness absence** - occur when an employee's underlying medical condition has an impact on their ability to fulfil the full duties of their role but may not affect their attendance at work. Such cases can also be managed under this policy. These concerns may originate as a performance concern, but further review might indicate they are more appropriately managed using the Managing Sickness Absence policy.
- 37.4 **Improvement Period** – Is a period of time in which the employee must achieve the required improvement in attendance which has been set out. Where a formal warning has been issued under formal stage one, the improvement period is the duration of the formal warning.
- 37.5 **Industrial Injury** – An industrial injury occurs when an employee becomes unable to attend work by reason of an accident, injury or industrial disease sustained in the course of their duties with the employer (and not being wholly or mainly due or seriously aggravated by the employee's own serious and culpable negligence or misconduct). Further explanation is given in the 'How to Guide – Industrial Injury'. It is the Line Manager's responsibility to decide whether a period of sickness absence is as a result of an industrial injury. Absence as a result of an industrial injury must still be managed in accordance with this sickness absence policy.
- 37.6 **Long-term sickness absence** – occurs when an employee is unable to return to work over a continuous and extended period due to an underlying medical condition or conditions. A long-term absence may also occur where the absence is broken up with unsuccessful attempts to return to work.
- 37.7 **Review Meetings** – these must be put in place at any stage of the policy where there is a concern about the employee's sickness absence levels. Notes of these meetings must be taken and saved on the employee's electronic personnel file by the manager.
- 37.8 **Short-term sickness absence** – is a period or periods of sickness absence that are not continuous and are normally short term in duration. The absences may be for related or unrelated reasons. The impact of the absence is that an employee is unable to attend work regularly and/or consistently.
- 37.9 **Trigger points** - A trigger point is a measure set by Bold Futures Federation, which allows consistent monitoring of absence for all employees. Managers must review absence when employee's absence meets or exceeds a trigger. The triggers for Bold Futures Federation are below.

38. **Part Three – Further Sources of Support**

39. **Employees:**

- 39.1 Queries should be directed to your line manager.

39.2 If your school has purchased the service, you may have access to free, confidential and impartial Employee Support at <https://www.hants.gov.uk/hampshire-services/occupational-health/schools/employee-support>. Your trade union or professional association may be able to provide you with additional support.

39.3 For schools that subscribe to Hampshire County Council's Occupational Health Service, for resources and general information on how to support your health and wellbeing go to <https://www.hants.gov.uk/hampshire-services/occupational-health/schools>

40. **Managers:**

40.1 Further information is available in the How to Guide and from your own Line Manager.

41. **Resources referred to in this policy:**

- Managing Sickness Absence - How to Guide
- Industrial Injury - How to Guide

42. **Part Four - Governance**

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Appendix One – Managing sickness absence for employees with less than two years’ employer continuous service

Reference must be made to the How to Guide – Managing Sickness Absence for further information relating to this section.

Policy stages

- 1 The possible stages are:
 - Management discussion
 - Formal stage – may result in dismissal

Management Discussion

- 2 The principles of the Management Discussion will apply

Formal stage

- 3 The principles of the Formal Stages will apply

Appeal

- 4 An employee has the right to appeal against a decision to dismiss. There is no right to appeal against any other action taken under this policy.
- 5 The principles of the Appeal Stage will apply.