



HR: STAFF SICKNESS ABSENCE POLICY

Review Due:	September 2027
Last Review:	September 2026
Applicable to:	All Trust Employees
Reviewed By:	LC
Approved By:	Executive Team
Date of Approval:	July 2024

1. Policy statement

- I. This sickness absence policy sets out our procedures for reporting sickness absence and for the management of sickness absence in a fair and consistent way.
- II. Sickness absence can vary from short intermittent periods of ill-health to a continuous period of long-term absence and have a number of different causes (for example, injuries, recurring conditions, or a serious illness requiring lengthy treatment)
- III. We wish to ensure that the reasons for sickness absence are understood in each case and investigated where necessary. In addition, where needed and reasonably practicable, measures will be taken to assist those who have been absent by reason of sickness to return to work. This policy includes both physical and mental health when considering sickness and disability
- IV. The policy applies to all employees. It does not apply to agency workers, consultants or self-employed contractors
- V. This policy does not form a part of any employee's contract of employment and it may be amended at any time. We may also vary the procedures set out in this policy, including any time limits, as appropriate in any case.
- VI. Any information you provide to us about your health will be processed lawfully and in accordance with our Data Protection Policy. We recognise that such data is sensitive and it will be handled in a confidential manner.
- VII. This policy is designed to be supportive. All employees have access to our Employee Assist Programme (EAP) which is a 24/7 helpline that offers confidential support and guidance. The can be accessed at <https://www.educationsupport.org.uk/> or telephone 08000 856148. Further support may be available via the school's staff insurance provider. Please contact your headteacher for further information.

2. Personnel responsible for this policy

The Partnership Trust has overall responsibility for the effective operation of this policy and for the ensuring compliance to the relevant statutory frameworks. Day to day responsibility for operating this policy and ensuring its maintenance and review has been assigned to the HR department

3. Who is covered by the policy?

This policy covers all employees at all levels and grades, including senior managers and part-time fixed term employees.

4. The Equality Act

Disability

The statutory definition of a disability is outlined in section 6 (1) of the Equality Act (2010)
"A person (P) has a disability if P has physical or mental impairment, and the impairment has a substantial and long-term adverse effect on their ability to carry out normal day-to-day activities"

We are aware that sickness absence may result from a disability. At each stage of the sickness absence meetings procedure, particular consideration will be given to whether there are reasonable adjustments that could be made to the requirements of the job or other aspects of working arrangements that will provide support at work and/or assist a return to work. We may ask that you consent to an occupational health referral for a professional medical appointment where appropriate. Where adaptations or adjustments are recommended by a medical practitioner to support a disabled employee to carry out their job, these will be implemented where reasonable.

If you consider that you are affected by a disability or any medical condition which affects your ability to undertake your work, you should inform your designated senior member of staff.

Pregnancy and maternity

Pregnancy and maternity are protected characteristics under the Equality Act 2010. Therefore, a woman should not receive unfavourable treatment in relation to her pregnancy or illness suffered by her as a result of that pregnancy.

The same absence levels will trigger review meetings with pregnant employees, pregnancy related sickness absence will not be counted when reviewing the employee's sickness absence record.

Gender reassignment

The Equality Act provides protection for people who are in the process of transitioning from one gender to another. The Trust will not treat transgender people less favourably for being absent from work because they propose to undergo, are undergoing or have undergone gender reassignment than they would be treated if they were absent because they were ill or injured.

The Equality Act does not state how much time must be allowed for absence because of gender reassignment, the Trust will:

- Discuss with an employee how much time they will need to take off
- Accommodate those needs in so far as they are able

5. Sickness absence reporting procedure

If you do not have a sickness absence reporting in your contract or school staff handbook, you should follow the absence procedure below.

- i. If you are taken ill or injured while at work you should report to or be taken to the designated senior member of staff and be given permission to leave work. Managers should contact the office to arrange for anyone who is unwell to be accompanied home or to receive medical treatment where necessary.
- ii. If you cannot attend work because you are ill or injured you should telephone your line managers as early as possible, and no later than the local school requirements. The following details should be provided:
 - a. The nature of your illness or injury
 - b. The expected length of your absence from work
 - c. Contract details

- d. Any outstanding or urgent work that requires attention
- e. Agree the next date or time of contact

This contact should be made via telephone and not via a third party unless circumstances mean that you are unable to use the telephone. It is important that the absence reporting procedures are followed for every absence. Failure to do so, may be viewed as unauthorised absence which may result in your pay being withheld and leave to action under the disciplinary policy.

- iii. Regular contact between you and your line manager is vital and you should agree an appropriate time and date for reviewing together, all but very short absences. The aim of maintaining contact during an absence is to provide you support, enable your manager to plan and to encourage an early return to work wherever possible.

6. Evidence of incapacity

- i. For sickness absences of up to seven calendar days you must complete (immediately upon your return) a 'self-certificate' form which is available from the school office. This should be returned to your line manager.
- ii. For absences of more than seven consecutive days including weekends, you must obtain a certificate from your doctor (a 'fit note') stating that you are not fit for work and the reason(s) why. This should be forwarded to the designated senior member of staff as soon as possible. If your absence continues, further medical certificates must be provided.
- iii. If your doctor provides a certificate stating that you 'may be fit for work' you should inform the designated senior member of staff immediately. We will discuss with you any additional measures that may be needed to facilitate your return to work, taking account of your doctor's advice. This may take place at a return to work interview. If appropriate measures are not feasible you will remain on sick leave and we will set a date to review the situation.
- iv. Where we are concerned about the reason for absence, or frequent short-term absence, we may require a medical certificate for each absence regardless of duration. In such circumstances, we will cover any costs incurred in obtaining such medical certificates, absences of a week or less on production of a doctor's invoice
- v. Medical suspension: If by being at work we believe that you posed a risk to yourself or others, we may suspend you on medical grounds. This is to allow us to obtain medical advice to confirm if you are fit to be at work. This is not a sanction against you, it is a precautionary measure and you will receive your normal pay.

7. Unauthorised absence

- i. Cases of unauthorised absence will be dealt with under our 'disciplinary policy'.
- ii. Absence that has not been notified according to the sickness absence reporting procedure may be treated as unauthorised absence.
- iii. If you do not report for work and have not followed the school's procedure for reporting absence, the designated senior member of staff will try to contact you by telephone and in writing if necessary. This should not be treated as a substitute for reporting sickness absence.

8. Sick pay

- i. You should refer to your contract for details of the sick pay to which you are entitled.
- ii. If a period of absence is or appears to be, occasioned by actionable negligence, nuisance or break or any statutory duty on the part of a third party, in respect of which damages are or may

be recoverable, you must immediately notify the designated senior member of staff of that fact and of any claim, compromise, settlement or judgement made or awarded in connection with it and all relevant particulars that we may reasonably require. If we require you to do so, you must cooperate in any related legal proceedings and refund to us that part of any damages or compensation you recover that relates to lost earnings for the period of the sickness absence as we may reasonably determine, less any costs you incurred in connection with the recovery of such damages or compensation, provided that the amount refunded to us shall not exceed the total amount we paid to you in respect of the period sickness absence.

- iii. For absences that extend beyond 7 days, we will be unable to pay sick pay if you do not have a certificate to cover the absence. In the rare event that contact is not maintained following the expiry of a GP 'Fit Note' you will be given 5 calendar days written notice before any suspension of sick pay

9. Keeping in contact during sickness absence

- i. If you are absent on sick leave for more than a few days, then you should seek to agree a contact plan with your line manager or senior leader. Such contact is intended to provide reassurance and will be kept up to an agreed level. Reasonable contact is:
 - a. To discuss your wellbeing
 - b. To discuss the employee's plans to return to work and/or expected length of continued absences and any work which requires attention
 - c. To discuss any special arrangements to be made, or training to be given, to ease an employee's return to work
 - d. To update the employee on developments at work during their absence. This would not constitute 'work' and such contact would not bring the sick absence period to an end.
- ii. If you have any concerns while absent on sick leave, about the reason for your absence or your ability to return to work, you should feel free to contact the designated senior member of staff at any time.

10. Medical examinations

- i. We may, at any time in operating this policy, ask you to consent to a medical examination by our occupational health partner or a doctor nominated by us at our expense. Occupational health advice plays an important part in supporting you. Please be aware that if you do not engage with referrals to occupational health, we can only support you and make decisions based on the other information we have available.
- ii. You will be asked to agree any report produced in connection with any such examination may be disclosed to us and that we may discuss the contents of the report with our advisers and the relevant doctor.

11. Return to work meetings

- i. Upon return to work following a period of sick absence you will have a return to work (see appendix 1) meeting with your line manager or a member of the senior leadership team, as appropriate.
- ii. A return to work meeting enables us to confirm the details of your absence and update you on anything you may have missed during your time away. It also gives you the opportunity to raise any concerns or questions that you may have and bring any relevant matters to our

attention. You will also be made aware of the sickness absence trigger points and your current status in relation to those triggers.

- iii. Where your GP has provided a certificate stating that you 'may be fit for work' we will discuss any additional measures or adjustments that may be needed to facilitate your return to work, considering the advice of your GP

12. Long term sickness absence

- i. Long term sickness absence is where you are absent for a period of more than 28 days. If you are unable to return after 28 days your line manager will arrange a review meeting with you to discuss your health and the support we can offer to help you return to and remain at work. It is recommended that these meetings should be held every 6-8 weeks to ensure that there is a positive ongoing dialogue. However, the timescales may vary depending on the medical condition and circumstances.
- ii. We are committed to helping employees to return to work from long term sickness absence. As part of our sickness absence meetings procedure we will where appropriate and possible support return to work via:
 - a. Obtaining medical advice
 - b. Making reasonable adjustments to the workplace, working practices and working hours
 - c. Consider phased return or redeployment
- iii. Agreeing the above with all affected parties.

13. Sickness absence meetings procedure

- i. Long term absence meetings are triggered if you are absent for a period of more than 28 days.
- ii. Short term absence meetings are triggered if the employee has hit one or more of the following criteria:
 - a. Has 4 or more occurrences of sickness absence in a rolling 12-month period
 - b. Has been absent for more than 10 days within a rolling 12-month period (this will be calculated on a pro-rata basis if you work less than 5 day per week)
 - c. Displays a pattern of absences which is causing concern e.g. regular Friday or Monday absences, absences pre or post annual leave, public holidays or pay days
- iii. Unless it is impracticable to do so, we will give you one week's written notice of the date, time and place of the sickness absence meeting. We will put any concerns about your sickness and the basis for those concerns in writing. A reasonable opportunity for you to consider this information before the meeting will be provided.
- iv. The meeting will be conducted by your line manager or a senior member of the leadership team. A member of the HR team may attend and there will be a notetaker present to record the meeting. You may bring a companion with you to the meeting.
- v. You must take all reasonable steps to attend the meeting. Failure to do so without good reason may be treated as misconduct. If you or your companion are unable to attend at the time specified you should immediately inform the meeting organiser who will see to agree an alternative time.
- vi. A meeting may be postponed if the school is awaiting receipt of information, needs to gather any further information or consider matters discussed at a previous meeting. You will be given a reasonable opportunity to consider any new information obtained before the meeting is reconvened.

- vii. Confirmation of any decision made at a meeting, the reasons for it and of the right to appeal will be given to you in writing within 1 week of the sickness absence meeting.
- viii. If, at any time, it is considered that you have taken or are taking sickness absence when you are not unwell, the matter may be referred to be dealt with under our disciplinary policy. Medical advice will be sought, if and when this is appropriate.

14. The right to be accompanied at sickness absence meetings

- i. You may bring a companion to any meeting or appeal under this procedure.
- ii. Your companion may be either a trade union representative or a fellow employee. Their identity should be confirmed to the meeting organiser at least 48 hours before it takes place.
- iii. Employees are allowed reasonable time off from duties without loss of pay to act as a companion. However, they are not obliged to act as a companion and may decline a request if they so wish.
- iv. Some companions may not be allowed. For example, anyone who may have a conflict of interest, or whose presence may prejudice a meeting.
- v. We may at our discretion, permit a companion who is not an employee or union representative (for example, a family member) where this will help overcome particular difficulties caused by disability, or difficulty understanding English.
- vi. A companion may make representations, ask questions, and sum up your position, but will not be able to answer questions on your behalf. You may confer privately with your companion at any time during the meeting

15. Stage 1: Informal meeting – short term absence

- i. The purpose of this meeting is to:
 - a. Discuss the reasons for absence
 - b. Where you have been absent on a number of occasions, determine the likelihood of further absences
 - c. Considering what, if any, measures might improve your health and attendance
 - d. Consider whether medical advice is required
 - e. See what can be done to improve your attendance and to set targets to support you to reduce your absences.
- ii. ***No formal warnings will be issued in a stage 1 informal meeting related to short term absence.***

16. Stage 2: Formal meeting – short term absence

- i. Depending on the matters discussed at the stage 1 informal meeting and where concerns about attendance continue a further meeting may be necessary. Arrangements for the formal stage 2 meeting will follow the procedure set out above in the informal stage 1 meeting.
- ii. The purpose of this meeting is to:
 - a. Discuss the reasons for and the impact of your ongoing absences
 - b. Where you have been absent on a number of occasions, determine the likelihood of further absences
 - c. Considering what, if any, measures might improve your health and attendance
 - d. Consider whether medical advice is required
 - e. See what can be done to improve your attendance and to set targets to support you to reduce your absences.

- iii. It is possible that an outcome of the meeting will be a **written warning** which will remain on your file for 1 year after the date of the meeting. For your awareness the warning stages are:
- Stage 1 – Informal review, targets and support
 - Stage 2 – Written warning, targets and support
 - Stage 3 – Final written warning, targets and support
 - Stage 4 – Dismissal

17. Stage 3: Formal meeting – short term absence

- i. Depending on the matters discussed at the stage 2 formal meeting and where concerns about attendance continue a further meeting may be necessary. Arrangements for the formal stage 3 meeting will follow the procedure set out above in the formal stage 2 meeting.
- ii. This meeting will be run by a senior member of the SLT and a member of HR must be present
- iii. The purpose of this meeting is to:
- a. Discuss the reasons for and the impact of your ongoing absences
 - b. Where you have been absent on a number of occasions, determine the likelihood of further absences
 - c. Considering what, if any, measures might improve your health and attendance
 - d. If it has not been obtained consider whether medical advice is required. If it has been obtained consider the advice that has been given whether further advice is required
 - e. Consider your ability to remain in your job in view of your capabilities and our business needs and any adjustments that can be reasonably made assist you to maintain effective attendance
 - f. See what can be done to improve your attendance and to set targets to support you to reduce your absences.
- iv. It is possible that an outcome of the meeting will be a **final written warning** which will remain on your file for 1 year after the date of the meeting. For your awareness the warning stages are:
- Stage 1 – Informal review, targets and support
 - Stage 2 – Written warning, targets and support
 - Stage 3 – Final written warning, targets and support
 - Stage 4 – Dismissal

18. Stage 4: Formal meeting – short term absence

- i. Where you have been warned that you are at risk of dismissal, we may invite you to a meeting under stage 4 for short term absence. This meeting will be held by someone more senior than those who held the stage 2 and 3 meetings. A senior leader from another school, a member of the board of governors and a member of trust HR must also be present.
- ii. Depending on the matters discussed at the stage 3 formal meeting and where concerns about attendance continue a further meeting may be necessary. Arrangements for the formal stage 4 meeting will follow the procedure set out above in the formal stage 3 meeting.
- iii. The purpose of the meeting will be:
- a. To review the meetings that have taken place and the matters discussed with you
 - b. To consider any further matters that you wish to raise

- c. To consider whether there is a reasonable likelihood of you achieving the desired level of attendance in a reasonable time.
 - d. To consider the possible termination of your employment
- iv. Termination will normally be with full notice or payment in lieu of notice

19. Stage 1: welfare meeting – long term absence

- I. The purpose of this meeting is to:
 - a. Find out how you are feeling and obtain an update on your health condition
 - b. Discuss next steps including any reasonable adjustments that could potentially facilitate a return to work
 - c. If appropriate consider seeking medical guidance regarding your health condition via our occupational health provider Optima Health.
 - d. Advise on any appropriate support mechanisms that may be beneficial for you
 - e. Provide an update on any workplace changes that have taken place whilst you have been off.
 - f. Clarify details regarding your sick pay entitlement and answer any questions you may have.
- II. Welfare meetings also provide an opportunity to ensure regular contact is maintained. Preventing employees who are absent due to long term sickness from feeling isolated and providing them with any support that is required. It is for this reason that the welfare meetings will be carried out regularly (approximating every 8 weeks) although frequency will depend on the circumstances of your condition

20. Stage 2: Informal meeting – long term absence

- I. A further meeting to review long term absence should be arranged approximately 8 weeks after the first welfare meeting.
- II. The purpose of this meeting is to:
 - a. Discuss your condition in more detail and obtaining an update regarding medical advice and any ongoing medical treatments
 - b. If appropriate consider seek medical guidance regarding your health condition via our occupational health provider Optima Health.
 - c. Advise on any appropriate support mechanisms that may be beneficial for you
 - d. Provide an update on any workplace changes that have taken place whilst you have been off.
 - e. Clarify details regarding your sick pay entitlement and answer any questions you may have.
 - f. Review in depth plans for reasonable adjustments, working practices and working hours to support a phased return programme
 - g. Explain that phased return will be in place for a maximum 6 weeks

21. Stage 3: Formal meeting – long term absence

- I. A further meeting to review long term absence should be arranged approximately 8 – 12 weeks after the stage 2 formal meeting.

- II. We are committed to helping employees return to work from long-term sickness absence. We will where appropriate and possible, support a return to work at the formal stage 3 review by:
 - a. Reviewing the occupational health report provided by Optima Health
 - b. Consider your ability to remain in your job in view of your capabilities and our business needs and any adjustments that can be reasonably made assist you to maintain effective attendance
 - c. Agree plans for reasonable adjustments, working practices and working hours to support a phased return programme which will be in place for a maximum 6 weeks
 - d. Discuss other options including ill health retirement
 - e. Explain that the final stage of this process is the stage 4 formal meeting where it is possible that your employment will be terminated as a result of capability due to long-term ill health in accordance with the Partnership Trust's Sickness & Absence policy.

22. Stage 4: Capability Hearing – long-term absence

- I. At the stage 3 formal meeting you were warned that you are at risk of dismissal if your long-term absence continues. This is the final meeting in the process and it will consist of a panel with a senior leader from the Trust in the chair. In addition, a senior leader from another school, a member of the board of governors and a member of trust HR must also be present.
- II. The purpose of this hearing will be to consider all relevant information in order to determine if The Partnership Trust are able to further support your continued long-term absence. The following will be covered:
 - a. The medical information from occupational health
 - b. Statement from employee and representative in relation to your health and the veracity of the report and its conclusions.
 - c. Final discussions on the likelihood of a return via the use of reasonable adjustments or redeployment
 - d. The impact that your continued absence has on The Partnership Trust covered in the capability report.
- III. A possible outcome from this hearing may be to terminate your employment as a result of capability due to long-term ill health in accordance with the Partnership Trust's Sickness & Absence policy.
- IV. Termination will normally be with full notice or payment in lieu of notice

23. Appeals

- i. You may appeal against the outcome of any stage of this procedure and you may bring a companion to an appeal meeting
- ii. An appeal should be in writing, stating the full grounds of the appeal to the manager who will be named in the outcome letter. This appeal should be made within one week of the date that you were informed of the outcome of the meeting.
- iii. Unless it is not practicable, you will be given written notice of an appeal meeting within 5 working days of the meeting. In cases of dismissal the appeal will be held as soon as possible. Any new matters raised in an appeal may delay an appeal meeting if further investigation is required.
- iv. You will be provided with written details of any new information which comes to light before an appeal meeting. You will also be given a reasonable opportunity to consider the information before the meeting.

- v. The appeal hearing will be conducted impartially by a panel of more senior employees and or governors/trustees who have not been previously involved in the case
- vi. Depending on the grounds of appeal, an appeal meeting may be a complete rehearing of the matter or a review of the original decision
- vii. Following an appeal, the original decision may be confirmed, revoked or replaced with a different decision. The final decision will be confirmed in writing, usually within one week of the appeal hearing. There will be no further right of appeal.
- viii. The date that any dismissal takes effect will not be delayed pending the outcome of an appeal. However, if the appeal is successful, the decision to dismiss will be revoked with no loss of continuity or pay.

24. Links to other policies:

- Staff time off work policy
- Stress management policy
- Menopause policy
- Employee mental health and wellbeing policy
- Disciplinary policy

Appendix 1 – return to work form



Return to Work Meeting

Name of Employee	
Job Title	
Date of return to work meeting	
Dates of absence (from – to)	
Reason for absence	

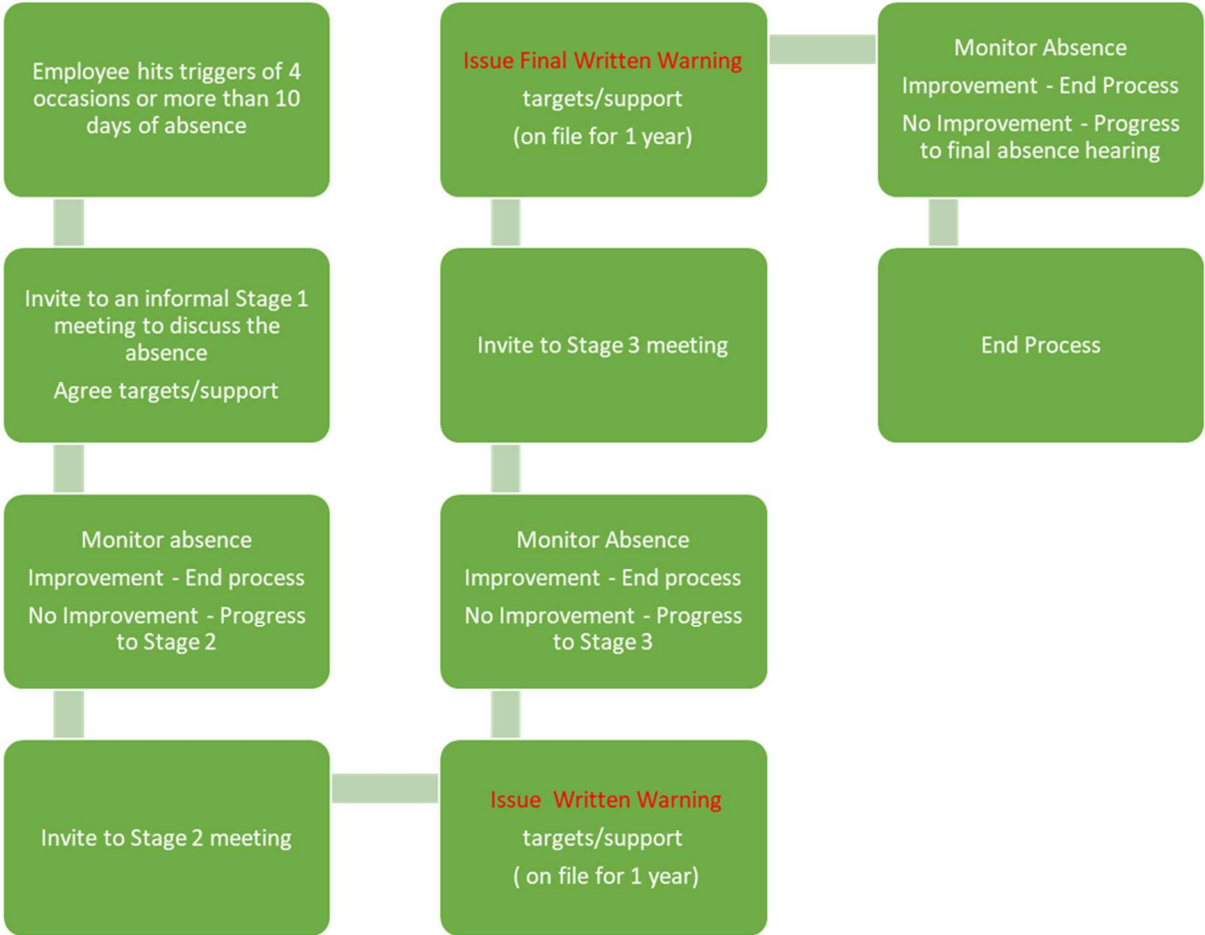
1. Welcome back. Make their return to work a positive one, and use this as an opportunity to make sure they really are well enough to come back.		
How is the employee feeling?		
2. Crucial updates. Consider what has happened in the employee's absence and ensure you take the opportunity to bring them up to speed.		
Explain to the employee how their absence was covered and anything they may have missed whilst off work:		
3. Confirm absence details.		
Could the employee please confirm the details for the absence are correct?	Yes	No
Has the employee completed a self-certificate?	Yes	No
Did the employee follow the correct sick reporting procedure?	Yes	No
<i>(for absences over 7 days)</i> Do we have a Fit Note to cover the whole absence?	Yes	No
Did the employee indicate that factors at work may have caused or contributed to the absence?	Yes	No
If yes, discuss including any potential resolutions:		
4. Support. Is further support / adjustment required?		
Did the employee consult their GP?	Yes	No
Did the GP make any recommendations on their 'fit note' such as a phased return or potential changes to employee's hours, duties or working environment?	Yes	No

If so, please state the recommendations:
Discuss if you are able to accommodate these recommendations & consider whether occupational health support may be required?
Does the employee require any other / further support?
Do you need to schedule a follow-up meeting with the employee? If so, agree a date / timeframe:
5. Open for questions. Let the employee ask you any questions that might be on their mind.
Any further comments from the employee and / or manager:
If appropriate, remind the employee of the services available to them via the Employee Assistance Programme - 08000 856 148. There may also be further support available to them via your Staff Insurance provider.
6. Trigger Points
Explain what the trigger points are and the employee's current position in terms of hitting the trigger points • Have 4 or more episodes of sickness absence in a rolling 12-month period • Have been absent for more than 10 days* within a 12-month period • Display a pattern of absence which is causing concern e.g. regular Friday or Monday absences, absences pre or post annual leave, public holidays or pay day.

Signature (Manager):	Date:
Employee Signature:	Date:

Appendix 2 - absence flow charts

Short-term absence



Long-term absence



