



# A FRAMEWORK FOR MAXIMISING ATTENDANCE AT WORK

<b>Title</b>	Maximising Attendance at Work
<b>Who should use this</b>	All Staff
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## 1. INTRODUCTION

This policy applies to all Board staff, its overall aim is to enable the Board to deliver high quality, cost effective services, to establish a framework which treats all employees in a fair and consistent manner and to provide employee support and assistance which encourages employee well-being. Employees will be provided with a safe and healthy working environment and conditions of employment which facilitate work life balance and a healthy lifestyle.

The Policy places a particular emphasis on prevention by requiring managers to identify and address the causes of absence and by tackling issues at the earliest possible stage. The Maximising Attendance Procedure (**Appendix 1**) for both Long and Short Term Absence has clear trigger points and timescales to ensure that managers are aware of the options open to them when dealing with attendance issues. It also equips managers with flexibility to deal with absence issues in an appropriate manner so that the difference between employees unable to attend work through genuine ill health and those who will not attend work can be recognised, thereby ensuring that the correct level of help and support is given to employees in genuine need while enabling managers to deal with any abuse of procedures.

For the purposes of this policy the term 'manager' refers to any employee of the Board with people management or supervisory responsibilities.

This policy has been developed jointly with the Trade Unions in line with the principles of partnership working.

### 1.1 OBJECTIVES

The Policy is structured around five objectives and detailed within each of these are the required actions of the Board, its management and employees. The objectives are:

1. The provision of a safe working environment
2. To support employees to adopt and maintain a healthy lifestyle
3. To maximise attendance
4. The reduction and prevention of workplace ill health
5. The provision of management information on attendance

## **OBJECTIVE 1 – SAFE WORKING ENVIRONMENT**

**AIM:** To provide employees with a safe working environment

### **1. ORGANISATIONAL ACTION**

- 1.1 To regularly review and develop the Board's Occupational Health and Safety Policy to ensure adherence to safe working practices.
- 1.2 To ensure the Board complies with its Health and Safety duties by arranging for the services of appropriately trained and experienced officers to provide professional health and safety advice.

### **2. MANAGEMENT ACTION**

- 2.1 To ensure all employees receive the appropriate Health and Safety information and training, including details of their individual responsibilities.

A manager must ensure that all employees receive appropriate information, instruction and training in connection with their work activity and workplace(s) to enable them to carry out their work activities safely.

All employees must be advised of the existence of the Board's Health & Safety Policy, the location of the first aid box, details of the designated first aider, fire evacuation procedures as well as all other details as specified in the Health & Safety Policy.

Individual employees must be made aware of their individual health and safety responsibilities and managers must ensure that each employee undertakes the training required to ensure safe working.

- 2.2 To regularly review and audit the Health and Safety Policy, all associated procedures and safe systems at work to ensure these continue to meet the needs of the Board:

Auditing the effectiveness of the Health and Safety Policy and the appropriateness of the systems of work are essential to ensuring a safe workplace. Accordingly Managers must regularly review/audit how work is being carried out in terms of the safety of the practices undertaken. A joint approach with local trade union representative(s) to workplace audits, including an agreed programme of joint workplace audits is recommended.

- 2.3 Ensure all appropriate COSHH, DSE and risk assessments are complete and regularly review these assessments:

There are a range of routine assessments which must be completed in order to comply with the Health and Safety Policy. These include COSHH assessments where employees are working with chemicals, Display Screen Equipment assessments where employees use computers and risk assessments to identify workplace hazards. A manager must ensure that all appropriate assessments are completed. In the event of an accident/near accident or incident, managers must review all appropriate assessments and working practices.

- 2.4 Provide information to the Health & Safety and Employee Representatives:

Managers have a responsibility to provide information regarding occupational health and safety matters such as accident statistics, completed assessments and audit findings. This communication could be via team briefings or meetings, etc.

Managers must also arrange for new employees to undertake the Board's Induction process where general safety information and safety information specific to their workplace respectively must be provided.

### **3. EMPLOYEE ACTION**

#### **3.1 Be aware of their individual health and safety responsibilities:**

All employees must put themselves in a position where they fully understand their responsibilities with regard to health and safety. This includes participation in relevant training.

#### **3.2 Take action when an unsafe system or situation becomes apparent:**

Employees must not disregard any unsafe systems or situations which come to their attention whether in their own or in another workplace. Such matters must be brought to the attention of their manager or supervisor.

## **OBJECTIVE 2 – HEALTHY LIFESTYLE**

**AIM:** To encourage and assist every employee to adopt and maintain a healthy lifestyle

### **1. ORGANISATIONAL ACTION**

- 1.1 To introduce health promotions which encourage employees to adopt a balanced lifestyle and identify and address any personal health problems.
- 1.2 To continue to develop working conditions and Conditions of Service which support and encourage safe working, employee well-being and a work/life balance.
- 1.3 To survey the health of the workforce and offer assistance to employees in advance of their absence from work.
- 1.4 To work in partnership with external organisations to promote health improvement initiatives.

### **2. MANAGEMENT ACTION**

- 2.1 To arrange regular and ad hoc health checks and fitness assessments:

Via SAC's Occupational Health Service, the Board makes available a range of regular health checks such as pre-employment health check, hearing assessments, driver health checks and fitness assessments. In addition, Occupational Health Services can arrange to medically examine employees and can access a physiotherapy service for employees. Details of these services will be provided regularly by the Occupational Health Service.

- 2.2 Be aware of and properly utilise the services offered by the Board to support employees.

All referrals to Occupational Health should be processed using the OHU referral form [ABS/FORM/1] and should be processed via the Board's Personnel Representatives. OHU will write to the employee regarding their appointment.

#### 2.2.1 Physiotherapy Service

Early access to physiotherapy service can prevent further deterioration of an employee's condition, facilitate an early return to work or prevent an absence from occurring in the first place. While physiotherapy is available for all Board employees whether present or absent from work, managers must ensure that physiotherapy is accessed via an OHU referral for any employee reporting a musculoskeletal condition.

#### 2.2.2 Employee Counselling Service

The Board offers a range of counselling and welfare services for employees. Where an employee indicates he/she has a problem such as alcohol or drug misuse, financial problems, domestic difficulties, personal stress/depression, bereavement or illness of a relative the employee's manager should advise the employee of the service(s) provided by the Board and offer these services to the employee. These can be arranged by SAC Human Resources who will also provide advice on these services. Alternatively, Trade Unions can arrange an appointment on behalf of an employee via SAC Human Resources.

### 2.2.3 Psychological Illness

Managers must automatically refer details of employees reporting absent due to psychological illness to the Board's Personnel Representatives. The Board's Personnel Representatives contact can provide, or arrange for the provision of, practical help and advice relevant to the cause of stress which in many instances can facilitate a return to work. Managers must ensure that appropriate support is accessed via an OHU referral for any employee reporting a psychological related condition.

### 2.2.4 Healthy Working Lives

Activities are co-ordinated through SAC's Occupational Health and Safety Team. Anyone wishing to become involved in Healthy Working Lives or simply seeks further details should contact SAC Occupational Health and Safety Team.

## 2.3 Be aware of the Board's Smoke Free Policy:

The Board is committed to providing education and information for all employees on smoking issues including assistance for those who wish to stop smoking. The benefits of stopping smoking include a direct benefit to overall health of the individual as their risk of developing tobacco related diseases reduces. Employees are encouraged to pursue the various organisations and facilities that are widely available to provide cessation services. The Occupational Health department will provide additional information and advice in support of this.

## 2.4 To establish effective working relations with trade unions in respect of health improvement initiatives:

Managers should work in partnership with trade union representatives to support health improvement initiatives within the workplace and encourage employees to adopt a healthier lifestyle. This may include identifying health improvement initiatives to deal with matters arising from discussions on health and safety issues.

Where possible, managers should provide facilities to enable employees to take part in healthy living activities such as smoking cessation counselling and organised lifestyle events.

## 3. EMPLOYEE ACTION

- 3.1. Employees should make themselves continually aware of the lifestyle changes they can make to improve and maintain good health and in so doing maximise their attendance at work.
- 3.2. Employees are required to attend all early intervention mechanisms offered which are put in place to support them during periods of absence. Employees would be permitted time away from work to attend any follow up appointments / ongoing treatment if they have returned to work.
- 3.3. Employees should make themselves aware of and utilise the health based services and initiatives available to the Board.
- 3.4. All employees should be aware of their responsibility in line with the Board's Health and Safety Policy. This will include having due care for their own safety and health and that of others. Employees should report all accidents, incidents, near misses or cases of occupational ill health to management as soon as possible and highlight any issues that they consider to be hazardous within the workplace.

## OBJECTIVE 3 – MAXIMISING ATTENDANCE

**AIM:** To promote and support management actions which encourage maximum attendance.

### 1. ORGANISATIONAL ACTION

- 1.1 To establish maximising attendance as a core management competence.
- 1.2 To provide all managers with guidance on the purpose, content and desired outcomes for the absence management process together with appropriate training. This will enable managers to competently undertake all stages of attendance, (including Stages 1, 2, and 3 of the Maximising Attendance procedure), identify patterns and frequencies of absences and motivate employees to attend work.
- 1.3 To screen the health of the *recommended candidate* after a conditional or unconditional offer of employment has been made. This is via the Occupational Health service provider.
- 1.4 Consider individual absence records as part of recruitment, redeployment, promotion, training and further education opportunities.

### 2. MANAGEMENT ACTION

- 2.1 All managers and supervisors should deal immediately, fairly and sensitively with their employees when they are absent from work:

Upon notification of an employee's absence the line manager should review the absence and complete ABS/FORM/2. If appropriate, personal contact should be made with the employee by telephone, home visit or arranged meeting. Early intervention is crucial and an essential first step is to ensure that when an employee is absent all relevant information is accurately and timeously recorded on the appropriate recording system.

By making direct contact the manager may also be able to offer practical assistance and support. Where appropriate there should be liaison with the employee's trade union representative on the best method of maintaining contact.

Absence information must be regularly reviewed to enable appropriate action to be taken. **Appendix 1** outlines the Maximising Attendance procedure and the responsibilities required of managers in dealing with absence issues. Managers and employees should be aware of the services available to employees (as detailed in Objective 2) and should utilise these as necessary.

- 2.2 Maintain appropriate regular contact with absent employees:

When an employee is absent due to illness, particularly if the absence is lengthy, the manager must keep in regular contact. Employees can often feel isolated when absent from work and it is important therefore that managers maintain contact, offer support and assistance wherever possible and, notwithstanding the requirements of the 'Statement of Fitness for Work' (hereafter referred to as the 'fit note', discuss with the employee the options available to allow an early return to work (see 2.3 below).

Contact can include:

- A home visit or arranged meeting at a mutually suitable location
- Keeping in contact by telephone between visits/meetings

- Arranging for colleagues to visit
- Keeping the employee informed of workplace activities

In order to support employees returning to work after a spell of long-term absence, an employee may benefit from the support of a 'buddy', who would normally be a colleague of the employee. During the absence, the buddy will provide the employee with regular contact and may cover formal, informal and social issues. When the employee returns to work, the buddy should continue to provide support for the first few days or weeks as appropriate. Arrangements should be agreed with the employee prior to their return to work to ensure all relevant parties are aware of the arrangements.

### 2.3 Adopt a flexible approach to maximising attendance, including use of the Scheme of Special Leave and Flexible Working policies.

On many occasions Doctors will recommend on the fit note that an employee is able to return to work providing certain adjustments are made to working arrangements. Adjustments may include reduced hours, limiting the range of work activities for a short period or temporary redeployment. If temporary adjustments are not feasible or if they prove to be unsuccessful a permanent reduction in hours or alternative duties or job should be considered. In such circumstances managers should liaise with SAC HR to agree the appropriateness of any proposed adjustments.

In situations where there is no indication on the fit note that a return to work is possible even with adjustments the manager must maintain contact with the employee and discuss support and adjustments to working arrangements which can facilitate a return to work. Other than in exceptional circumstances managers should be able to identify adjustments which enable the employee to return to work.

Managers should use the flexibility contained within the Scheme of Special Leave and other related policies. These can help employees maintain their work/life balance by providing some time away from their workplace which may otherwise have resulted in sickness absence e.g. amending an employee's time in the office by allowing home working.

## 3. EMPLOYEE ACTION

3.1 It is the responsibility of all employees to make every effort to attend work. Employees should advise their line manager of absence from work no later than 10.00 am on the morning of the absence and thereafter adhere to ongoing absence notification procedures. Employees will have a small information card providing the name and telephone number of their line manager and these reporting lines must be followed.

3.2 It is the employee's responsibility to take all reasonable steps to facilitate an early return to work from any period of absence. In the event of absence employees must fulfil the notification procedures as outlined in **Appendix 2**.

Failure to follow the correct notification and certification procedure may result in sickness allowance being withheld and disciplinary action being considered.

## **OBJECTIVE 4 – REDUCE AND PREVENT CAUSES OF WORKPLACE ILL HEALTH**

**AIM:** To identify, reduce and prevent the causes of workplace ill health

### **1. ORGANISATIONAL ACTION**

- 1.1 To ensure employees are fit for their posts:
- a) In terms of health assessment; and
  - b) With the appropriate training and support required.
- 1.2 To train managers to use the risk assessment systems to identify the reasons for health problems in the workplace.
- 1.3 To give employees access to learning opportunities to enhance their skills and knowledge.
- 1.4 To provide early interventions for employees such as:
- Occupational Health Support
  - HR Support Officer
  - Physiotherapy
  - Employee Counselling Service
  - Confidential Help lines
  - Other professional support organisations

### **2. MANAGEMENT ACTION**

- 2.1 Promote positive health and lifestyle events within teams:

Health checks can be carried out by SAC Occupational Health to alert employees and managers to health problems e.g. blood pressure, hearing, lifestyle, lung capacity, and a range of health promotion events are held throughout the year. Managers should encourage employees to participate in these events. Details of events will be provided by South Ayrshire Council.

- 2.2 Review workplace ill health and develop appropriate responses:

Managers should review absence information, health and safety information, etc. to identify any issues which may be related to workplace ill health. Where areas for improvement are identified managers should take remedial action with assistance from SAC Human Resources and/or SAC Corporate Health and Safety where necessary.

- 2.3 Review management information and statistics related to workplace ill health, including absence levels, accident statistics and COSHH and Risk assessments:

Instances of work related stress, respect at work complaints and violent incidents will also be monitored. Where trends, exceptions or patterns are identified, appropriate remedial action will be taken. The type and nature of management information gathered will be monitored and amended where appropriate to reflect changing needs.

2.4 Communicate and encourage feedback regarding workplace health issues.

Managers will routinely discuss workplace ill health with their employee group. Employees should be encouraged to contribute to discussions on whether and how improvements can be made to reduce or prevent the causes of workplace ill health. It is recommended that this should be a standing item on the agenda of team meetings.

2.5 Recognise the causes and symptoms of stress in the workplace and take appropriate, preventative action.

Managers should assess the risk of stress by looking at potential contributing factors and take reasonable steps to address these. Such factors should be ascertained by undertaking a Stress Risk Assessment. For example managers should monitor working hours and counsel employees who regularly work in excess of their contractual hours either through Flexible Working Hours Scheme or by working overtime.

Managers should be aware of signs of stress in their employee e.g. absence, poor productivity, reduced performance, mood changes, poor concentration and working long hours. Any employee citing a psychological related illness should be immediately referred to OHU.

Appropriate training is available to help managers identify and manage stress in the workplace, and to help employees cope with stress.

Further information can be obtained by contacting the Board's Personnel Representatives.

### 3. **EMPLOYEE ACTION**

3.1 Be aware and take advantage of health promotion opportunities and events offered by the Board and South Ayrshire Council.

3.2 Take advantage of the confidential helplines available through SAC Human Resources.

3.3 Treat all colleagues in a fair and respectful manner.

## **OBJECTIVE 5 – PROVISION OF MANAGEMENT INFORMATION**

**AIM:** To provide regular information on attendance to all stakeholders

### **1. ORGANISATIONAL ACTION**

- 1.1 Provide statistical analysis of attendance figures to all employees and managers.
- 1.2 Analyse national trends and developments in maximising attendance and keep managers and employees up to date on the national situation.
- 1.3 Ensure line managers are provided with regular information on attendance statistics across the Board as well as within their own area of responsibility.

### **2. MANAGEMENT ACTION**

- 2.1 Managers should make use of available communication methods to ensure that all employees are aware of the importance placed on good attendance. Information relating to attendance should be displayed in a user-friendly format and communicated to employees via newsletters and team briefings. Information must be provided within a reasonable timeframe as this will allow the appropriate action to be taken promptly thereby avoiding any unnecessary delay in an employee's return to work. As part of the induction process, new recruits should be briefed on the absence policy, trigger points and notification procedures and advised that attendance records are monitored and action taken where necessary.

It may be useful to display trends relating to particular workgroups or teams although Managers must ensure that any information provided cannot identify individuals and that confidentiality is protected at all times.

- 2.2 Develop, maintain and fully utilise an efficient, electronic system for recording and reporting on attendance and to provide consistent, accurate and early information on attendance.
- 2.3 Ensure employees are informed of attendance levels. This can be achieved via individual meetings with employees, e.g., Performance & Development Review, and Return to Work discussions or via team meetings.

### **3. EMPLOYEE ACTION**

- 3.1 Actively participate in discussions on attendance information to improve own and team attendance.

## A FRAMEWORK FOR MAXIMISING ATTENDANCE

### GUIDANCE FOR MANAGERS

1. Introduction
2. Notification and Certification Procedures
3. Occupational Health Referrals
4. Procedure for Dealing with Short Term Absence
  - 4.1 Process
  - 4.2 Discretion
  - 4.3 Contact
  - 4.4 Case Review
  - 4.5 Compliance
  - 4.6 Return to Work
  - 4.7 Stage 1 Meeting
  - 4.8 Stage 2 Meeting
  - 4.9 Stage 3 Meeting
5. Procedure for Dealing with Long Term Absence
  - 5.1 Process
  - 5.2 Discretion
  - 5.3 Return to Work
  - 5.4 Case Review
  - 5.5 Compliance
  - 5.6 Contact
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6. Right to be Accompanied
7. Appeals
8. Monitoring
9. Miscellaneous
  - 9.1 Elective Cosmetic Surgery
  - 9.2 Conduct Prejudicial to Recovery
  - 9.3 Secondary Employment/Business
  - 9.4 Sickness Absence attributable to misconduct or negligence or due to active participation in sport or work for payment.
  - 9.5 Sickness Absence as a Result of an Accident

## 1. INTRODUCTION

Absence can normally be categorised into either short term or long term and, as the management action differs slightly for each, the procedures deal separately with each category.

In some circumstances an absence may not fall neatly into one category and may meet the trigger for both short and long term. In this instance Managers should review the employee's absence record and decide which category is most appropriate.

While the Framework sets minimum standards, Managers can take action where, although not meeting the specified trigger points, an employee's attendance is a cause for concern. For example, there may be occasions where an employee's absence is satisfactory, only to lapse soon after the end of the review period. Where such a pattern emerges, the employee's record under the Maximising Attendance procedures should be borne in mind in deciding whether to move to the next stage of the procedure, or to repeat the review period.

## 2. NOTIFICATION AND CERTIFICATION PROCEDURES

- 2.1 Employees must fulfil the notification and certification requirements set out in their Terms and Conditions of Employment. In order to qualify for statutory and occupational sickness allowance employees are required to contact their Line Manger by telephone (other forms of communication are not acceptable e.g. text or e-mail) on the 1<sup>st</sup>, 4<sup>th</sup>, and 7<sup>th</sup> day of the absence. Managers must ensure employees have received information detailing the absence reporting procedures.

An employee should advise their line manager or designated person within the service of their non-attendance no later than 10.00 am on the morning of the absence. If an employee has not contacted his/her manager or other nominated officer by the end of that day, the Manager/Supervisor must make reasonable effort to contact the employee by telephone and/or other means.

The line manager/designated person should complete a Sickness Absence Reporting Form [ABS/FORM/2] for the employee. This form has been designed to ensure that the reason behind the employee's absence is investigated and assistance offered as early as possible.

Where an employee does not fulfil their responsibilities under these procedures managers should follow the procedures set out in **Appendix 2**.

## 3. OCCUPATIONAL HEALTH REFERRALS

- 3.1. Providing there is good reason, an employee can be referred to, and must attend, Occupational Health at any point during the contract of employment but referrals should only be made where the Occupational Health Report will assist with attendance management e.g. to confirm or establish an underlying medical condition as the reason for absence, or to assist an employee to remain at work through e.g. physiotherapy or counselling. Unrelated absences do not necessarily require a referral.
- 3.2 All referrals must be made via the Board's Personnel Representatives.
- 3.3 For long term absences consideration must be given to the possibility of the employee being referred to Occupational Health or, where appropriate, to seek other medical opinion as early as possible in the absence. Occupational Health must be notified of all cases when an employee has been, or is likely to be, absent for four calendar weeks or more and there is no date identified for a return to work. Occupational Health will then decide on the appropriate course of action.

- 3.4 All work related stress cases must be referred immediately and, where practicable, a Stress Risk Assessment Pro Forma should also be submitted.
- 3.5 Managers should refer to the Occupational Health Referrals and Reports Guidance [ABS/GUIDE/2] for further advice.

#### 4. **PROCEDURE FOR DEALING WITH SHORT TERM ABSENCE**

- 4.1 The process begins with the Return to Work Interview and thereafter Managers are expected to monitor the employee's attendance and take the action required at the following trigger points:

<p style="text-align: center;"><b>Stage 1 Meeting</b></p> <p style="text-align: center;"><b>To be held following:</b></p> <p style="text-align: center;">10 consecutive working day's absence (<i>pro-rated as appropriate</i>) Or 9 cumulative working days of sickness absence (<i>pro-rated as appropriate</i>), taken over more than one occasion, in a rolling 12 month period Or 3 occasions of sickness absence in a rolling 12 month period, irrespective of the length of absence</p> <p style="text-align: center;"><b>Stage 2 Meeting</b></p> <p style="text-align: center;"><b>To be held following a further:</b></p> <p style="text-align: center;">2 occasions of sickness absence in the 12 month monitoring period, <i>irrespective of the length of absence</i> Or 6 consecutive working days sickness absence (<i>pro-rated as appropriate</i>) in the 12 month monitoring period</p> <p style="text-align: center;"><b>Stage 3 Meeting</b></p> <p style="text-align: center;"><b>To be held following a further:</b></p> <p style="text-align: center;">1 instance in the 12 month monitoring period  (A Case Review must be held prior to a Stage 3 Meeting)</p>
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Monitoring Periods are effective from the date of the particular Meeting.

- 4.2 An element of discretion can be used in applying this process, but only where an employee:
- Has a good attendance record over a number of years i.e. at least 3 years, and whose attendance has not previously been a cause of concern to management; or
  - Is absent due to a chronic illness/disease; or
  - Has to undergo a surgical procedure/requires hospitalisation which has a specified/expected date of recovery; or

- Has a disability or an underlying medical condition which affects their attendance intermittently over a set period of time. For short term absence, this may include varying the attendance targets; or
- Has been absent for pregnancy related reasons; or
- Has been absent due to bereavement; or
- Has been absent due to an accident or injury at work.

Any decision to vary from procedure must be approved by the Assessor & ERO. For further guidance on applying discretion please refer to ABS/GUIDE/4.

The employee's absence will still be monitored and recorded and should the employee's absence extend beyond the revised target or expected date of return, discretion should be removed and the formal procedures applied.

#### 4.3 **Contact During Short Term Absence (From 1<sup>st</sup> Day of absence)**

During absence from work it is important that contact between employee and manager is made and maintained. The responsibility for doing so lies equally with the manager and the employee therefore the employee must remain contactable during any period of absence and respond to letter and phone messages. The level and type of contact will depend on the reason for absence but, as a minimum, Managers should maintain contact that provides an understanding of a possible return date and any support the Board can provide to assist recovery or return to work e.g. flexible hours.

Employees must adhere to the notification procedures and respond to phone calls, letters and e-mails provide details of any change of address, and provide notification of absences from home exceeding 3 days e.g. visits to friends/relatives, holidays and where possible, hospital stays. Failure to do so will result in the removal of Occupational Sick Pay.

4.4 A Case Review, involving the employee's line manager and a representative from SAC HR, can be convened at any stage of the procedure but must be convened before a Stage 3 meeting.

4.5 Employees are contractually required to comply with the terms of this Policy. Where an employee is persistently unable or unwilling to attend a Stage 1, 2 or 3 meeting without good cause, the Chair of the meeting will consider the information that is available at that time and make a decision based on that information. The employee will then be informed in writing of the outcome.

#### 4.6 **Return to Work**

Within 3 working days of an employee's return to work his/her Line Manager must discuss with the employee the reason for the absence. This allows the Line Manager to identify any underlying reason and, if appropriate, make a referral to the Counselling Service/Occupational Health at the earliest possible stage. A Return to Work form [ABS/FORM/3] should be completed.

Managers should also ensure that the employee:

- Is aware of any concerns regarding his/her level of attendance; and
- Has been given the opportunity of support; and
- Is aware of the possible consequences of continued poor attendance

Managers should refer to the Conducting Effective Return to Work Meeting guidance note [ABS/GUIDE/1].

#### 4.7 Maximising Attendance Stage 1 Meeting

**Trigger: 10 consecutive working days of sickness absence (pro-rated for part time employees), or 9 cumulative working day's absence (pro-rated for part time employees) taken over more than one occasion in a rolling 12 month period or 3 occasions of sickness absence of any length, in a rolling 12 month period.**

The Stage 1 meeting is a formal meeting and is designed to:

- Ensure that the employee is aware of the seriousness of their poor attendance and of the Maximising Attendance policy; and
- Discuss any factors contributing to the poor attendance and consider ways that the employee's attendance can be improved;
- Remind the employee that his/her attendance will be monitored for a period of 12 months, effective from the date of the meeting; and
- Make the employee fully aware of the consequences should his/her attendance fail to improve.

Interviews should be held within 14 days of reaching the trigger point. However managers should also be sensitive to recovery periods and, where necessary, the interview can be postponed until the employee has made a full recovery. Managers should refer to standard letters ABS/LET/1 and ABS/LET/3.

#### 4.8 Maximising Attendance Stage 2 Meeting

**Trigger: 2 occasions of sickness absence of any length or 6 consecutive working days (pro-rated for part time employees) in the 12 month monitoring period.**

If the sickness absence exceeds the target set out at the first stage meeting, the employee will be called to a Stage 2 meeting.

The Stage 2 discussions, considerations, and timescales are the same as those for the Stage 1 meeting. Managers should refer to standard letters ABS/LET/2 and ABS/LET/3.

#### 4.9 Maximising Attendance Stage 3 Meeting

**Trigger: 1 occasion in the 12 month monitoring period**

The third stage meeting is the final stage and will normally result in the employee being dismissed. Accordingly, the Stage 3 meeting will be chaired by the Assessor & ERO. Prior to the meeting, the Chair must convene a Case Review with the employee's line manager and a representative from SAC HR to consider the contents of the Maximising Attendance Case Review Report [ABS/FORM/7].

Where the required attendance target has not been achieved without good reason, the Chair may terminate the employee's employment on the grounds of incapability due to poor attendance record.

Termination on the grounds of incapability should only be considered where:

- An employee is no longer capable of undertaking his/her duties; and
- The job/work location cannot be 'reasonably adjusted' to accommodate the situation; and
- Ill health retirement is not appropriate

Where the employee is dismissed on the grounds of incapability, he/she shall be advised of their right to appeal against the decisions of dismissal. The decision must be confirmed in writing and a copy of the letter must be sent to the representative present at the interview and the employee.

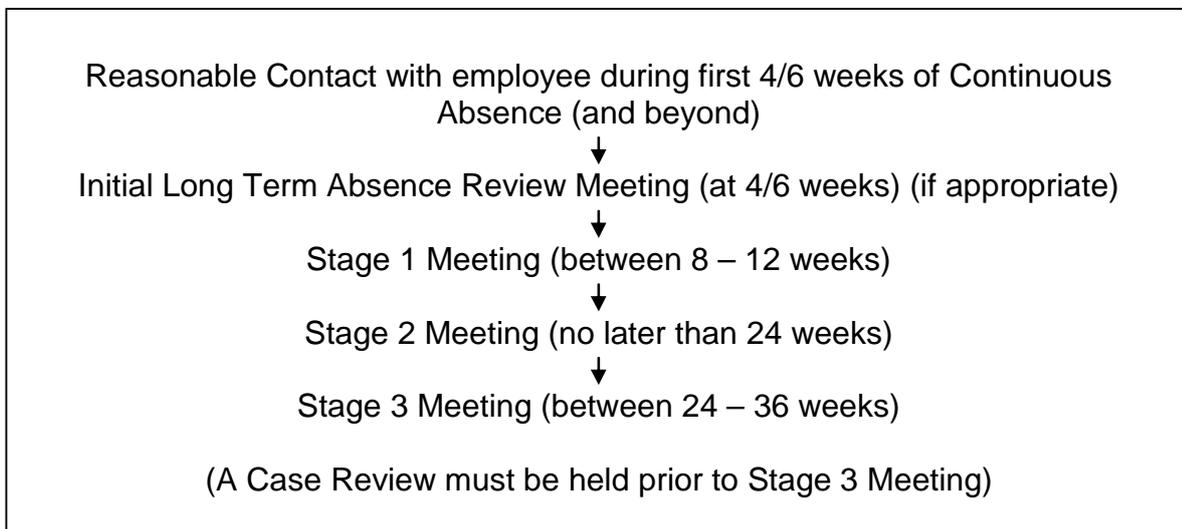
Managers should refer to the Conducting a Stage 3 Interview guidance ABS/GUIDE/3 and refer to standard letters ABS/LET/4 and ABS/LET/5.

## 5. PROCEDURE FOR DEALING WITH LONG TERM ABSENCE

5.1 The aim of this procedure is to ensure that Managers:

- Maintain contact with absent employees throughout the period of absence
- Continue to offer and discuss possible support mechanisms
- Ensure that the employee is aware of the possible consequences of their continued absence

Long term absence cases will be considered on their individual circumstances but within the parameters set out in the procedure below.



5.2 An element of discretion can be applied, but only where the employee:

- Has a good attendance record over a number of years i.e. at least 3 years, and whose attendance has not previously been a cause of concern to management; or
- Is absent due to a chronic illness/disease; or
- Has to undergo a surgical procedure/requires hospitalisation which has a specified/expected date of recovery; or
- Has a disability or an underlying medical condition which affects their attendance; or
- Has been absent for pregnancy related reasons; or
- Has been absent due to bereavement; or
- Has been absent due to an accident or injury at work.

Any decision to vary from procedure must be approved by the Assessor & ERO.

Should the employee's absence extend beyond the original expected date of return, discretion will normally be removed and the formal procedures applied.

### 5.3 Return to Work

The Line Manger will conduct a Return to Work Interview with the employee within 3 working days of the employee's return to work after long term absence. A Return to Work form should be completed [ABS/FORM/3].

This allows the Manger the opportunity to discuss the employee's absence and, if appropriate, arrange for necessary support or assistance.

As the absence will have met the trigger for a Stage 1 Meeting under the Procedure for Dealing with Short Term Absence, it will be treated in the same way. Therefore the Manager must refer to the Procedure for Dealing with Short Term Absence and advise the employee that his/her absence will be monitored for 12 months and that further absences during that period could lead to a Stage 2 Meeting.

5.4 A Case Review, involving the employee's line manager and a representative from SAC HR, can be convened at any stage of the procedure but must be convened before a Stage 3 meeting.

5.5 Employees are contractually required to comply with the terms of this Policy. Where an employee is persistently unable or unwilling to attend a Stage 1, 2 or 3 meeting without good cause, the Chair of the meeting will consider the information that is available at that time and make a decision based on that information. The employee will then be informed in writing of the outcome.

### 5.6 Contact During Long Term Absence (From 1<sup>st</sup> Day of absence)

During absence from work it is important that contact between employee and manager is made and maintained. The responsibility for doing so lies equally with the manager and the employee therefore the employee must remain contactable during any period of absence and respond to letter and phone messages. The level and type of contact will depend on the reason for absence but, as a minimum, managers should maintain contact that provides an understanding of a possible return date and any support the Board can provide to assist recovery or return to work e.g. flexible hours, working from home. However, contact will normally be no less than 6-weekly.

Employees must adhere to the notification procedures and respond to phone calls, letters and e-mails provide details of any change of address, and provide notification of absences from home exceeding 3 days e.g. visits to friends/relatives, holidays and where possible, hospital stays. Failure to do so may result in the removal of Occupational Sick Pay.

At the outset employees should also be advised that should the absence reach 4 continuous weeks then a Long Term Absence Initial Review Meeting will be arranged, and if there is no return within the following 8 weeks a formal meeting will be arranged under the Maximising Attendance Procedure.

### 5.7 Initial Long Term Absence Review Meeting (At 4 continuous weeks)

The initial review meeting should take place as soon as possible after the absence reaches 4 continuous weeks but no later than 6 weeks. Where an employee is hospitalised, the meeting should be deferred to a more appropriate date.

The review allows the manager to:

- Gain a better understanding of the reason for the absence
- Ascertain the expected return-to-work date
- To identify any support that the Board can offer to aid recovery

- To consider the merits of a referral to Occupational Health
- Explain the Maximising Attendance procedures
- To identify any reasonable adjustments that would facilitate an early return to work, working from home.

The venue for the meeting will normally be Board premises, but in exceptional circumstances the employee's own home, or another mutually acceptable location. There may also be circumstances where the discussion can take place by telephone.

Managers should use the Long Term Absence Review pro forma to assist with this discussion. [ABS/FORM/6]

### 5.8 **Stage 1 Meeting (At 8 – 12 weeks continuous absence)**

A Stage 1 meeting should be arranged from 8 weeks continuous sickness absence and no later than 12 weeks. The venue for the meeting will normally be Board premises, but in exceptional circumstances the employee's own home or another mutually acceptable location can be used.

- A recent Occupational Health report must always be available
  - a) If the Occupational Health report indicates that the employee will be fit to return in 12 weeks or less, then the Interview should focus on the employee's progress prior to the expected return date, the likelihood of the employee returning to work on that date and any possible adjustments.
  - b) If the expected date of return is unknown or much longer than 12 weeks the meeting will consider:
    - Previous discussions with the employee;
    - The employee's future employment prospects including other options such as : reasonable adjustments and change in hours.
    - The latest OH report and the employee's current and future capability;
    - Ill Health Retirement;
    - Available support;
    - Future action should the absence continue up to 24 weeks.

Managers should refer to standard letters ABS/LET/1 and ABS/LET/3.

### 5.9 **Stage 2 Meeting (At no later than 24 weeks continuous absence)**

A Stage 2 meeting should be arranged for no later than 24 weeks continuous absence. The venue for the meeting will normally be Board premises, but in exceptional circumstances the employee's own home or another mutually acceptable location can be used.

A recent Occupational Health report must be obtained before holding a Stage 2 meeting. At the meeting all of the following matters should be covered:

- Previous discussions with the employee;
- A possible return date and the employee's future employment prospects including other options such as reasonable adjustments and change in hours, working from home;
- The latest OH report and the employee's current and future capability;
- Ill Health Retirement;
- Available support;

- The employee should be informed that cases of significant long term absence cannot be sustained indefinitely and if the absence continues with no prospect of a return to work in the foreseeable future, and if ill health retirement is not possible, a Stage 3 Formal meeting will be arranged to consider dismissal;

Managers should refer to standard letters ABS/LET/2 and ABS/LET/3.

#### **5.10 Stage 3 Meeting (Between 24-36 weeks continuous sickness absence)**

Prior to the meeting, the Chair must convene a Case Review with the employee's line manager and a representative from SAC HR to consider the contents of the Maximising Attendance Case Review Report [ABS/FORM/7] and decide whether a return to work is realistic. If a return to work within the 36 week period is unlikely, a Stage 3 meeting will be arranged.

The purpose of the Stage 3 meeting will be to consider whether there are any further actions that the Board can take to assist the employee in continuing their employment or whether employment should be terminated due to the employee's continuing incapability to undertake their duties effectively because of their ill health.

When reaching a decision about whether or not to dismiss, the Chair will consider all available relevant information including all of the following:

- The impact of the absence on colleagues and service delivery;
- The employee's absence record and the Occupational Health advice received;
- Any representation made by the employee and/or their representative; and
- What actions have been taken/considered to enable the employee to continue in their employment

Termination on the grounds of incapability should only be considered where:

- An employee is no longer capable of undertaking their duties; and
- The job/work location cannot be 'reasonably adjusted' to accommodate their situation; and
- An offer(s) of redeployment to alternative duties has been made and rejected by the employee; and
- There are no appropriate redeployment opportunities within the Board; and
- Ill health retirement is not appropriate

Where the employee is dismissed on the grounds of incapability, he/she shall be advised of their right to appeal against the decisions of dismissal. A copy of the letter should be sent to the representative present at the interview and the employee. Managers should refer to standard letters ABS/LET/4 and ABS/LET/5.

## **6. RIGHT TO BE ACCOMPANIED**

An employee has the right to be accompanied by either a trade union representative or an appropriate work colleague, at Stages 1, 2 and 3 of the procedure for both short and long term absence.

Prior to any meeting, the employee shall provide the manager concerned, with verbal or written confirmation of who they will be accompanied by. Where the employee has chosen to be accompanied by a work colleague, the manager will decide on the appropriateness of the colleague's participation.

Reasonable time off should be given to allow those involved to prepare for the meeting.

An employee can offer an alternative meeting date where the accompanying person cannot attend on the date proposed by management. However, the interview shall normally be re-arranged within five working days beginning with the working day after the day initially proposed by the manager.

The employee and the accompanying person shall take as full a part in the discussion as possible and both have the right to address management and to ask questions. However the accompanying person does not have the right to answer on behalf of the employee who should respond to questions asked directly of him/her.

## **7. APPEALS**

An employee has the right to appeal at Stages 1, 2 and 3 of both the short and long term procedure. The appeal can be against either the facts which led to the procedures being invoked or any decision taken by management under this procedure.

If the employee chooses to exercise this right, an appeal stating fully the grounds on which it is based, should be made in writing using Maximising Attendance Notification of Appeal form [ABS/FORM/8] either by the employee or his/her trade union representative on his/her behalf. The Appeal has to be made within 14 days of the receipt of the letter notifying the employee of the outcome of the stage 1, 2 or 3 meeting.

An appeal against a decision taken at Stage 1 or Stage 2 should be sent to the relevant Nominated Senior Officer who will hear the appeal or arrange for another appropriate Officer to hear the appeal.

An appeal against a decision taken at Stage 3 should be sent to the Assessor & ERO. The appeal will then be heard by the Board's Appeals Panel.

The employee shall be given 7 days' notice in writing of the time and venue of the Appeal Hearing. At the Appeal Hearing, the original decision can be revoked, confirmed or varied.

The result of the Appeal Hearing shall be notified in writing to the employee and the trade union representative where appropriate within 7 days of the decision being taken.

## **8. MONITORING**

Statistics will be provided to Management Team on a monthly basis. The monitoring reports should include details of:

- a) the action taken in respect of those employees who have met the absence triggers; and
- b) the reason for the decision, where no action has been taken

It is expected that the Board will provide year-on-year improvements to their employee attendance levels and targets should be included in the Annual Service plan.

The Management Team will be updated monthly and the Board will also be updated regularly.

## **9. MISCELLANEOUS**

### **9.1 Elective Cosmetic Surgery**

In circumstances where an employee elects to undergo cosmetic surgery, Annual Leave, Flexi Leave or TOIL should be used. Where this is not possible, employees may apply for unpaid leave.

If the cosmetic surgery process results in complications which lead to some form of ill health, the Board's Sickness Absence Provisions will apply.

### **9.2 Conduct Prejudicial to Recovery**

If an employee is guilty of conduct prejudicial to recovery, the payment of sickness allowance may be suspended and the employee will forfeit the right to any further payment of allowance in respect of that period of absence.

### **9.3 Secondary Employment**

As employees on sick leave are obliged not to act in a way that is prejudicial to their recovery, secondary employment/business may only continue during periods of sick leave with the written consent of the Assessor & ERO.

### **9.4 Sickness Absence attributable to misconduct or negligence or due to active participation in sport or work for payment.**

An employee will be excluded from entitlement to sickness allowance where the sickness absence is due to:

- a) The employee's own misconduct or negligence; or
- b) The employee's active participation in sport for payment; or
- c) Injury whilst undertaking paid secondary employment.

### **9.5 Sickness Absence as a Result of an Accident**

An employee who is absent as a result of an accident is required to advise his/her Line Manager whether it is intended to pursue a claim against a third party or insurer in respect of responsibility for that accident. If there is no such intention, sickness allowance will be payable in the normal way.

Where such an intention is indicated the Board may, having regard to the circumstances of the case, advance to the officer a sum not exceeding the sickness allowance provided under this clause, subject to the officer undertaking to refund to the Board the total amount of such allowances or the proportion thereof represented in any amount of damages received. Any amount previously paid as sickness allowance shall be taken to be part of the advance and treated as such.

Any period of absence in such a case where a refund of the advance is made in full, shall not be treated as sickness absence and shall not count against the employee's periods of entitlement. It shall instead be treated as special leave. Where, however, the refund is made in part only, the period of absence not covered by the amount of damage will not be treated as sickness absence and will not count against the periods of entitlement. It will instead be treated as special leave. Where there is no award of damages the absence will be treated as sickness absence and count against the periods of entitlement.

## **NOTIFICATION AND CERTIFICATION PROCEDURES**

### **INTRODUCTION**

Ayrshire Valuation Joint Board reserves the right to withhold payment of sick pay if, following investigation, there is clear evidence that the employee has failed to comply with the Board's Maximising Attendance Policy with regard to notification or certification procedures, without good reason. Clear disregard of the requirement to meet the notification and certification requirements will be dealt with through the Board's Disciplinary Procedure.

#### **a) Initial Action**

An employee should contact their Line Manager by telephone (other forms of communication are not acceptable e.g. text or e-mail) to advise of their non-attendance no later than 10.00 am on the morning of the absence. If an employee has not contacted his/her manager or other nominated officer by the end of that day, the manager must make reasonable effort to contact the employee by telephone and/or other means.

#### **b) The employee returns to work on the next working day**

If the employee returns to work the next working day, the manager must meet with the employee to discuss the circumstances behind their failure to make contact.

If the employee cannot offer a satisfactory explanation for their failure to contact, disciplinary action may be taken if considered appropriate and/or sickness allowance may be withheld for the period of absence.

#### **c) The employee does not return by the end of the next working day**

Where the employee does not return to work by the end of the next working day, standard letter ABS/LET/6 should be sent to the employee by recorded delivery. If the employee cannot offer a satisfactory explanation for their failure to make contact, disciplinary action may be taken if considered appropriate and/or sickness allowance be withheld for the appropriate period.

#### **d) Action to be taken if an employee makes initial contact but fails to produce a medical certificate on the eighth day of absence.**

The manager/supervisor will contact the employee, using Letter ABS/LET/7 to remind them of the requirement, and advise that payment of sick pay will be suspended if a certificate is not provided within 5 days of when the certificate is due. The manager/supervisor must arrange a meeting with the employee on their return to establish the reason for the certificate not being produced on time.

If the employee cannot offer a satisfactory explanation for their failure to produce a medical certificate disciplinary action may be taken if considered appropriate and/or statutory sick pay allowance must be withheld for the appropriate period.

**STANDARD DOCUMENTATION**

These standard letters and forms are for guidance only and may be adapted to suit particular circumstances. In these situations managers should seek guidance from the Board's Personnel Representatives.

**FORMS**

ABS/FORM/1	Referral to Occupational Health
ABS/FORM/2	Absence Reporting Form
ABS/FORM/3	Return to Work Form
ABS/FORM/4	Absence Report/Self Certificate Form
ABS/FORM/5	Skills Profile
ABS/FORM/6	Long Term Absence Review Proforma
ABS/FORM/7	Maximising Attendance Case Review Proforma
ABS/FORM/8	Maximising Attendance Notification of Appeal Form
ABS/FORM/9	Discretion Request Form

**LETTERS**

ABS/LET/1	Maximising Attendance Stage 1 Invite
ABS/LET/2	Maximising Attendance Stage 2 Invite
ABS/LET/3	Maximising Attendance Stage 1/Stage 2 Outcome
ABS/LET/4	Maximising Attendance Stage 3 Invite
ABS/LET/5	Maximising Attendance Stage 3 Outcome
ABS/LET/6	Unauthorised Absence
ABS/LET/7	Sickness Absence Reporting Procedure
ABS/LET/8	Notification of Medical Examination
ABS/LET/9	Review Meeting Following Medical Examination
ABS/LET/10	Invite to Occupational Health

**GUIDANCE NOTES**

ABS/GUIDE/1	Return to Work Interview - Guidance
ABS/GUIDE/2	Occupational Health Referrals and Reports
ABS/GUIDE/3	Conducting a Stage 3 Meeting
ABS/GUIDE/4	Applying Discretion
ABS/GUIDE/5	Classifications of Absence



<b>4. SUPPLEMENTARY – JOB TASK PROFILE OF EXPOSURE LEVELS</b> (Tick as appropriate – information from employee line manager or attach Job Description)				
<b>Rate of exposure (working day)</b>	<b>Never 0%</b>	<b>Rarely 30%</b>	<b>Frequently Up to 60%</b>	<b>Constantly Over 60%</b>
Fork lift truck:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lone working:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outside work:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extremes of temperature:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shift/night work/on-call duties:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supervision of staff:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Computer/DSE work:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-DSE desk work:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Noise:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ionising radiation:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lasers:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manual handling:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crawling/crouching/kneeling:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sitting/standing/stopping/twisting:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reaching above shoulder height:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing heights – steps ladders:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exposure to hazardous substances (solvents/liquids etc. – specify below):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inhalation exposure to hazardous substances (solvents/liquids etc. – specify below):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other hazards – hazardous dirty waste (specify below):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working at heights – scaffold/roof work:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (specify below):				

<b>5. TRIGGER FOR REFERRAL TO OCCUPATIONAL HEALTH</b> (tick all that apply and provide background information below):
--

a) Recurrent short term absence – non recurrent cause:	
b) Recurrent short term absence – single cause:	
c) Long term sickness absence (over 28 days):	
d) Health conditions which may be exacerbated by occupational exposure:	
e) Investigation of workplace injury / illness:	
f) Inability to undertake work tasks:	
g) Concerns regarding change in behaviour / performance deterioration (specify further detail below):	
h) Request for Physiotherapy:	
i) Fitness to attend a fact finding interview / disciplinary hearing:	
j) Other (specify fully below):	
<b>PROVIDE BACKGROUND INFORMATION WHICH HAS TRIGGERED REFERRAL TO OHU</b> (Please provide as much detail as possible and if the employee is absent from work absence history [3 years if available] and start date of current absence <u>must</u> be provided):	

<b>6. QUESTIONS FOR OCCUPATIONAL HEALTH TO ANSWER:</b>	
a) Is the employee fit for work:	<input type="checkbox"/>
b) When will the employee become fit to work:	<input type="checkbox"/>
c) Is the employee likely to have further absences due to this illness:	<input type="checkbox"/>
d) Is the medical problem likely to be caused or made worse by current work activity:	<input type="checkbox"/>
e) Is the Equality Act 2010 likely to apply with regards to a recognised disability:	<input type="checkbox"/>
f) Are there any workplace adjustments required to aid the employee back to work:  <i>If you wish OHU to discuss any recommended support prior to issuing the report please tick here:</i> <input type="checkbox"/>	<input type="checkbox"/>
g) Is there an underlying medical condition, which could account for these absences:	<input type="checkbox"/>
h) Does the employee meet the criteria for ill health retiral:	<input type="checkbox"/>
i) Request to OHU to consider an 'Activity for Health' Referral:	<input type="checkbox"/>
j) Any other specific additional questions (please detail below):	<input type="checkbox"/>

<b>7. HR CONTACT DETAILS:</b> (the report will be returned to the person named below)	
Name:	
Department:	
Phone number:	
Referring HR contact signature:	
Date of referral:	

<b>8. REFERRAL PROCESS CHECKLIST (TO BE COMPLETED BY REFERRING MANAGER/BOARD'S PERSONNEL REPRESENTATIVES):</b>	
The referring manager (as named in Section 2 of this form)/Board's Personnel Representatives have discussed the reason for the OH referral with the employee. <i>(This discussion is mandatory to ensure the employee is aware of the referral and reasons for doing so <b>prior</b> to OHU issuing the appointment letter).</i>	<input type="checkbox"/>
I will provide the employee with a copy of this form at their request.	<input type="checkbox"/>
I have completed all relevant sections within this referral form, specifying the particular question(s) which I require OH to answer.	<input type="checkbox"/>
The employee has been made aware that a report answering these questions will be returned to the referring person, a copy of which will be provided to the employee at their request.	<input type="checkbox"/>
I have attached the employee's past sickness absence details for the past 3 years <i>(if available and must be provided for all referrals)</i> including the start date of current absence (if applicable).	<input type="checkbox"/>

**Data Protection** – Optima Health recognise the importance of respecting the personal privacy of all customer data and the need to build in appropriate safeguards during the collection, storage, processing and utilisation of personal data.

Optima Health will comply with the requirements of all relevant data protection legislation. Information will be collected and used fairly, stored safely and not disclosed to any person unlawfully. Optima Health acts in the role of Data Protection Controller and Data Processor for customer data. For further information on how we manage your data please see our data protection policy at [www.optimahealth.co.uk](http://www.optimahealth.co.uk)

FOR OH USE ONLY

Date Received	
Triage Outcome	
Appointment date and time	



**ABSENCE REPORTING FORM**

[to be completed by the Line Manager upon initial contact from employee who is reporting unfit for work. Copy held with Return to Work form]

**EMPLOYEE:**

Name:		NI Number	
Employee number:		Job title:	
Section:			

**ABSENCE DETAIL:**

Notification day:		Notification date:	
Notification time:		Received by:	
Did employee make contact in person:	<input type="checkbox"/> Yes <input type="checkbox"/> No		
If not who made contact and why:			

**QUESTIONS TO ASK:**

1.	Is this your first day of illness?	<input type="checkbox"/> Yes <input type="checkbox"/> No If not, note first day:
2.	What is the reason for your absence? (refer to ABS/GUIDE/3)	
3.	Any action required:	<input type="checkbox"/> OHU Referral <input type="checkbox"/> Physiotherapy Reasonable Adjustments: <input type="checkbox"/> Phased return <input type="checkbox"/> Altered hours <input type="checkbox"/> Amended duties <input type="checkbox"/> Workplace Adaptations  Other:
4.	How long do you think you will be absent?	
5.	Are you arranging to see your G.P.?	<input type="checkbox"/> Yes <input type="checkbox"/> No
6.	If you are unable to return to work by [ ] (day 4 of absence) you must contact me again no later than [ ] (specify time, normally within 1 hour of shift start time)	
7.	Do you have any outstanding work/deadlines/meetings that require cover/action while you are absent?	
8.	Is there anything else we need to know?	
9.	Is there any additional support/advice I can give to help?	

Signed (Manager/Supervisor): \_\_\_\_\_ Date: \_\_\_\_\_

**RETURN TO WORK FORM**

[to be completed by the Line Manager and a copy held with Absence Reporting form]

**EMPLOYEE:**

Name:		NI Number	
Employee Number:		Job Title:	
Section			

**PREVIOUS ABSENCE RECORD – LAST 3 YEARS (if available):**

Dates of previous absence	Reason for absence	Total days absent

**CURRENT ABSENCE DETAILS:**

First day of absence	
Last day of absence	
Return to work date	
Reason for absence & classification (refer to ABS/GUIDE/3)	
Return to work interview date	

**RETURN TO WORK DISCUSSION / ACTION:**

	Yes	No
Has the employee been updated on any issues that occurred during his/her absence?		
Is any re-training required (for long term absences)?		
Are there any issues the employee wishes to raise following their recent absence?		
Does the employee have a recognised disability, an underlying medical condition or a pregnancy related illness?		
Has a short or long term trigger point for further action been reached)? If so has the employee been made aware of this?  <i>(Note: A stage 1 meeting should be convened on an employee's return from long term absence)</i>	Detail:	
Is there any further action/advice required, e.g., use of Discretion:	<input type="checkbox"/> OHU Referral <input type="checkbox"/> Physiotherapy Reasonable Adjustments: <input type="checkbox"/> Phased return <input type="checkbox"/> Altered hours <input type="checkbox"/> Amended duties <input type="checkbox"/> Workplace Adaptations Other:	

Signed (Employee): \_\_\_\_\_ Date: \_\_\_\_\_

Signed (Manager/Supervisor): \_\_\_\_\_ Date: \_\_\_\_\_



**ABSENCE REPORT**

ABS/FORM/4

**PART 1 TO BE COMPLETED BY EMPLOYEE ON RETURN TO WORK**

*Note: For absence of 7 calendar days or less, only this form requires to be submitted. Where absence continues beyond 7 calendar days, this form requires to be submitted together with a Statement of Fitness for Work (MED3 04/10)*

**EMPLOYMENT**

Section \_\_\_\_\_  
Employee No. \_\_\_\_\_

**EMPLOYEE DETAILS**

Surname \_\_\_\_\_  
First Name(s) \_\_\_\_\_  
Home Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
NI Number \_\_\_\_\_

**PERIOD OF ABSENCE**

First day Day: ..... Date: .....  
\*Last Day Day ..... Date .....

\* Leave blank if absence is continuing beyond 7 calendar days, and this form is submitted with a Statement of Fitness for Work (MED3 04/10)

This form is used to establish reasons for absence and a record of attendance. It will be securely stored and only authorised personnel will have access to it.

**ABSENCE REASON**

Give details of the reason for your absence: (Note: "illness", "unwell", "sick" or "pregnant" are not sufficient:.....)

*If injured at work, give date and details of the accident, including the date of entry in the Accident Book or Register:*

Details \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Date of Accident \_\_\_\_\_  
Date entered in Accident Book \_\_\_\_\_

*If you have visited your GP or a hospital during your absence, please state:*

Date \_\_\_\_\_  
Doctors Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Advice \_\_\_\_\_  
\_\_\_\_\_

**EMPLOYEE DECLARATION**

I declare that the above statement is true and accurate to the best of my knowledge. I understand that to give details or misleading information can result in disciplinary action, which may amount to dismissal.

Signature ..... Date .....

**PART 2 TO BE COMPLETED BY SUPERVISOR**

I declare that I have discussed the above with the employee.

Supervisor: ..... Date: .....

**Previous Absence Report Date**

From: ..... To: .....

### REDEPLOYMENT – SKILLS PROFILE

This information will be used to assist us in the process of redeploying you. Please be assured that we will endeavour to redeploy you to a suitable post and that the information will be treated confidentially. Some posts require us to conduct a Disclosure Scotland Check. No appointments will be made until this check has been completed.

To allow you to be considered for all suitable opportunities please ensure the Skills Profile is completed fully and returned to your Line Manager. Should you require any assistance please contact the Board’s Personnel Representatives.

<b>CURRENT DETAILS:</b>	
<b>NAME:</b>	
<b>ADDRESS:</b>	
<b>CONTACT NUMBERS:</b>	
<b>WORK</b>	
<b>HOME</b>	
<b>DATE OF BIRTH:</b>	
<b>NI NUMBER:</b>	
<b>EMPLOYEE NUMBER:</b>	
<b>START DATE:</b>	
<b>MEMBER OF PENSION SCHEME:</b>	*YES / NO
<b>JOB TITLE:</b>	
<b>SECTION:</b>	
<b>LOCATION:</b>	
<b>CURRENT HOURS:</b>	Hours:  * Full Time / Part Time / Job Share
<b>LEVEL/GRADE/SCP:</b>	
<b>SALARY:</b>	

<b>LINE MANAGER:</b>	
<b>CURRENT DUTIES:</b> (Attach Job Description if available)	
<b>QUALIFICATIONS:</b>	
<b>WORK EXPERIENCE –</b> Including experience gained prior to joining Ayrshire Valuation Joint Board and any interests outwith work	
<b>REDEPLOYMENT PREFERENCES:</b>	
<b>What re-training would you require and will you undertake?</b>	
<b>PREFERRED WORKING HOURS:</b>	
<b>LIMITATIONS:</b>  Are there any limitations to your physical ability to carry out certain tasks?	
<b>WOULD YOU REQUIRE INTERVIEW TRAINING?</b>	*YES/ NO

<b>ANY OTHER RELEVANT INFORMATION TO SUPPORT YOUR SKILLS PROFILE:</b>	
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**\*Please delete as appropriate**

I confirm that the information contained in this Skills Profile is, to my knowledge, correct.

Signature \_\_\_\_\_ Date \_\_\_\_\_

For Office Use Only

<b>Date received</b>	
<b>Received By</b>	

**This form is used to provide information as to your suitability to be re-deployed and will be stored securely and can only be accessed by those involved in the selection process.**

**LONG TERM ABSENCE REVIEW MEETING PROFORMA**

[to be completed by the Line Manager when absence reaches 4 continuous weeks]

**EMPLOYEE:**

Name:		NI Number	
Employee number:		Job title:	
Section:			

**PREVIOUS ABSENCE RECORD – LAST 3 YEARS (if available):**

Dates of previous absence	Reason for absence	Total days absent

**CURRENT ABSENCE DETAIL:**

First day of absence	
Proposed return to work date	
Reason for absence & classification (refer to ABS/GUIDE/3)	

**POINTS FOR DISCUSSION:**

1.	Current absence and reason(s):	Notes:
2.	Expected return to work date:	Notes:
3.	Advice from G.P.:	Notes:
4.	Any action/support required to facilitate an early return to work:	<input type="checkbox"/> OHU Referral <input type="checkbox"/> Physiotherapy Reasonable Adjustments: <input type="checkbox"/> Phased return <input type="checkbox"/> Altered hours <input type="checkbox"/> Amended duties <input type="checkbox"/> Workplace Adaptations  Other:
5.	Use of Discretion:	Notes:
6.	Explanation of Maximising Attendance procedures:	Notes:
7.	Do you have any outstanding work that requires action while you are absent?	
8.	Is there anything else we need to know?	
9.	Is there any additional support/advice I can give to help?	

Signed (Manager/Supervisor): \_\_\_\_\_ Date: \_\_\_\_\_

**MAXIMISING ATTENDANCE CASE REVIEW**

[to be completed by Line Manager and the Board's Personnel Representatives]

**PERSONAL DETAILS:**

Employee's Name:	
Date of Birth:	
Home Address:	
Post Held:	
FTE (work pattern):	
Location:	
Start Date in Post:	
Cont. Service Date:	
Pensionable:	

**ABSENCE RECORD – LAST 3 YEARS (if available):**

Start Date:	Finish Date:	Reason for absence & classification (refer to ABS/GUIDE/3):

**CURRENT ABSENCE DETAILS:**

First day of absence:	
Return to work date (if applicable):	
Reason for absence & classification (refer to ABS/GUIDE/3):	

*% Absence levels (relevant to current absence)*

Dates:	Absence (%):

*Sickness allowance for this period of absence:*

Dates:	Half/Full or No Pay:

*Employee notified absence level cause for concern:*

Date Notified:	Notified by:

**OCCUPATIONAL HEALTH INVOLVEMENT:**

Date Referred:	Date Attended:	Outcome:

**REASONABLE ADJUSTMENTS /ALTERNATIVE OPTIONS:** Please detail which of the following options have been discussed with the employee:

Possible Options:	Y/N	Date	Outcome:
Changes to Working Pattern:			
Workplace support e.g. "Access to Work", "Activity for Health":			
Career Break:			
Flexible Working:			
Discretion Applied:			
Alternative Employment e.g., Vacancy list issued:			
Managing Change i.e. redeployment:			

Voluntary Severance (Compassionate Grounds):			
Other:			
Pensionable Options for Consideration (if applicable):			
	Y/N	Full	Partial
Actuarially Reduced:			
Phased Retirement:			
Ill Health Retirement:			

**RISK ASSESSMENT (including Stress Risk Assessment):**

Dates:	Risk Rating Before Adjustments:	Risk Rating Following Adjustments:	Please provide details:

**COMMENTS/ADDITIONAL INFORMATION:** Please provide any additional information if necessary.

Signed (Line Manager/): \_\_\_\_\_ Date: \_\_\_\_\_  
 Board's Personnel Representative: \_\_\_\_\_ Date: \_\_\_\_\_

**MAXIMISING ATTENDANCE NOTIFICATION OF APPEAL**

Note: If completing by hand, please do so *clearly* and in *black ink*. If you require assistance in completing this form please contact the Board's Personnel Representatives.

SECTION A:			
EMPLOYEE DETAILS:			
Name:		Section:	
Employee Number:			
Home Address:		Job Title:	
		Work Location:	
Contact Telephone Number:		Phone (Work):	
		Representative:	
		Trade Union	

SECTION B:			
PLEASE INDICATE THE STAGE OF THE PROCEDURE THAT THIS APPEAL RELATES TO.			
Stage 1	<input type="checkbox"/>	Stage 2	<input type="checkbox"/>
		Stage 3	<input type="checkbox"/>

SECTION C:
PLEASE PROVIDE THE REASON(S) FOR YOUR APPEAL:

If necessary, continue on another page and attach other relevant documentation.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**DISCRETION REQUEST FORM**

[to be completed by the Line Manager and once authorised return to the Board's Personnel Representatives]

To:		From:	
<b><i>With reference to the information detailed below, I am formally requesting discretion to vary from the prescribed Maximising Attendance procedure as follows:</i></b>			

**EMPLOYEE:**

Name:		Service:	
Employee Number:		Job Title:	
Section			

**PREVIOUS ABSENCE RECORD – LAST 3 YEARS (if available):**

Dates of previous absence:	Reason for absence:	Total days absent:

**CURRENT ABSENCE DETAILS:**

First day of absence:	
Return to work date (if applicable):	
Reason for absence & classification (refer to ABS/GUIDE/3):	

**ACTION:**

Has the trigger point for further action been reached i.e. Stage 1, 2 or 3? If yes please provide detail and confirm the employee has been made aware of this.	Detail:
Reason for Discretion request:	<input type="checkbox"/> Good attendance over last 3 years and absence not previously a cause for concern <input type="checkbox"/> Chronic illness/disease <input type="checkbox"/> Surgical procedure/hospitalisation with specified/expected date of recovery <input type="checkbox"/> Disability/Underlying medical condition <input type="checkbox"/> Bereavement <input type="checkbox"/> Accident/Injury at Work
Please detail the discretion request i.e. how long and reason.	Detail:
Is there any further action/advice required to manage the employee's absence:	<input type="checkbox"/> OHU Referral <input type="checkbox"/> Physiotherapy Reasonable Adjustments: <input type="checkbox"/> Phased return <input type="checkbox"/> Altered hours <input type="checkbox"/> Amended duties <input type="checkbox"/> Workplace Adaptations  Other:

<b>Discretion Request Granted:</b>	<b>Yes:</b>		<b>No:</b>	
Detail Discretion agreed:				
Reason for refusal:				

Signed (Service Manager): \_\_\_\_\_ Date: \_\_\_\_\_

## **ABS/GUIDE/1: CONDUCTING AN EFFECTIVE RETURN TO WORK MEETING**

Managers must meet with employees within 3 working days of their return to work after sickness absence, regardless of length of absence or their current/historic sickness absence record.

If possible the discussion should take place in a private space with no interruptions. In circumstances where it is not possible to meet face to face, the line manager can conduct the discussions over the telephone, in a private space.

The manager should ensure that they have a copy of the employee's absence record available and a 'Return to Work Form' [ABS/FORM/3] on which to record the RTW discussion.

Prior to the RTW discussion the line manager will review the employee's absence record to look for any sickness absence patterns (e.g. Monday/Friday, before/after holidays) and check if the employee has reached any of the management action sickness absence triggers.

When discussing the absence line managers should indicate their concern and interest in the welfare of the employee and try to explore any underlying reasons for the absence, ways of improving attendance and determining if there is any need for a visit to occupational health, counselling, guidance or other support should be also discussed.

If the line manager can see an absence pattern emerging they should explore this in the RTW discussion and give the employee an opportunity to explain any patterns which may have emerged.

The line manager should summarise the discussion and ensure mutual understanding to establish a clear plan of action; complete the 'Return to Work Form' [ABS/FORM/2] and ask the employee to sign at the end of the discussion (or at a later date if the discussion took place over the telephone). The employee should also complete and sign an 'Absence Report Form' [ABS/FORM/4].

## **ABS/GUIDE/2: DEALING WITH OCCUPATIONAL HEALTH REFERRALS AND REPORTS**

Employees should only be referred to Occupational Health by the Board's Personnel Representatives where their absence is classified as long term (4 weeks or more) and/or where it is considered that a medical opinion is required to confirm the nature of the illness, the earliest return to work date or to identify any suitable alternative work that could be carried out.

Referrals to Occupational Health are made by completing a 'Referral to Occupational Health Form' [ABS/FORM/1] for the employee concerned and sending it to SAC Occupational Health.

When referrals are made to Occupational Health the following accompanying documentation should be included with the referral form:

- Confirmation that the employee has been made fully aware of the reason for referral; plus
- A minimum of three years attendance/sickness records for the employee; plus
- A comprehensive job description covering the physical environmental or mental factors which may be causing the employee difficulty; plus
- Any other relevant information.

Following the examination or consultation, a summary report will be sent directly and confidentially to the Board's Personnel Representative.

On receipt of the report it is the responsibility of the line manager to review the report, decide upon the appropriate course of action; then meet with the employee and develop a joint action plan based on the following:

- The information obtained in the initial interviews
- Occupational Health report concerning the employee's future fitness to return to work
- The operational impact that the employee's absence is having on the service being provided

The Manager/Supervisor must then decide if:

- A further period of absence can reasonably be sustained by the Board
- If action must be taken as set out in the Maximising Attendance Procedure

Reports from the Occupational Health Service will normally indicate the following:

### **Employee is fit to return to a full range of duties:**

It is acknowledged that the line manager and employee may have anxieties about the employee's ability to cope with the demands of the job when they return after a long period of absence. Depending on the medical advice given and the employee's General Practitioner agreeing, the following courses of action may be considered:

- A modified workload for an agreed period so that the employee is not 'thrown in at the deep end.'
- Mid-week return so that the employee has only to work two or three days before having a weekend break; or
- A phased return starting part-time or part-week and building up over an agreed period to full-time working

### **Employee is fit to return with restrictions:**

Managers should consider adjusting the employee's workload to enable the employee's return to work. Where reasonable adjustments can be made to the workplace or alternative employment considered these should be discussed with the employee and Occupational Health, and a provisional timetable for return agreed. In the event that the employee is still unable to return to work, it may be appropriate to consider dismissal due to incapability.

### **Employee is fit to return but to an alternative post:**

Where the employee is permanently unable to carry out their current duties but could return to alternative employment the manager should consider alternative employment based on the medical evidence provided. Initially, attempts should be made to redeploy the employee within their own service, however if this is not possible redeployment to another service should be pursued through SAC Human Resources. Please see the Board's Managing Change Policy for further details.

### **Employee is not expected to return to work in near future but may eventually be fit enough to return:**

If the report from Occupational Health at this point in time indicates that the employee is not expected to return to work in the near future, the line manager must review the absence on a regular basis, in line with the Maximising Attendance procedure.

Where it is not possible to conclude the case after one consultation, for example because of the need to procure external reports, Occupational Health shall make this clear in the report detailing the reasons for continuing the case, and the proposed timescale of review.

Once this report is received from the Occupational Health Service and there is still no indication of a return to work date, the manager will arrange to meet with the absent employee as soon as possible thereafter, to discuss the continuing absence.

### **Employee is permanently unfit to carry out their duties and responsibilities and those of any other post:**

A Stage 3 meeting should be arranged with the employee to discuss the medical report/s from Occupational Health with a view to reaching mutual agreement that the employee retires on the grounds of incapability due to ill health or is dismissed.

## **ABS/GUIDE/3: CONDUCTING A STAGE 3 INTERVIEW (MAXIMISING ATTENDANCE)**

This guidance should be read prior to conducting a stage 3 meeting.

### **1. Arranging a Stage 3 Meeting**

A Stage 3 Case Review involving the employee's manager and a representative from SAC HR and with reference to the Case Review [ABS/FORM/7] should be held prior to inviting an employee to a Stage 3 Meeting. This ensures that all of the required information e.g. a specialist report, is available, to aid Managers make informed decisions about the employee's sickness absence.

The Meeting should be held by an appropriate Officer. The employee should be encouraged to be accompanied by a union representative or work colleague and should be fully aware of the possible outcome of the meeting.

### **2. Conducting a Stage 3 Interview**

The following should be discussed:

- Advice from Occupational Health;
- The expected return to work date (for long term absence);
- Reasonable Adjustments – implemented and not implemented;
- Suitability for alternative employment – redeployment procedure;
- Ill Health Retiral.

### **3. Considerations prior to dismissing at a Stage 3 Interview**

- To sustain dismissal there needs to be a consistent record of non-improvement in the employee's record or no foreseeable return to work date, with each stage clearly documented, setting out the requirements of management and the employee's obligations.
- If the employee is disabled under the Equality Act 2010, it must be clearly demonstrated reasonable adjustments have been considered.
- There should be a consistent record of absences, supporting medical opinion of reason for the absences, knowledge of the employee's intentions and perhaps a record of unfulfilled employee obligations.
- Should there still be no indication of an expected return to work or absence targets have failed to be met, and continuing absence is disrupting service delivery, serious consideration must be given to the possibility of the employee being dismissed on the grounds of ill health.

## ABS/GUIDE/4: APPLYING DISCRETION

### INTRODUCTION

The Maximising Attendance procedure outlines the levels of attendance expected of all employees. The procedure also provides guidance as to when employees should be invited to formal Stage 1, 2, or 3 managing absence meetings. However where a Line Manager feels that a particular case requires discretion to vary from the prescribed procedures, they must formally request discretion from the Assessor & ERO/Head of Valuation Services, setting out the reason and type of discretion requested.

The Maximising Attendance policy states that discretion should only be considered where the employee:

- Has a good attendance record over a number of years and whose attendance has not previously been a cause of concern to management; or
- Is absent due to a chronic illness/disease; or
- Has to undergo a surgical procedure/requires hospitalisation which has a specified/expected date of recovery; or
- Has a disability or an underlying medical condition which affects their attendance intermittently over a set period of time. For short term absence this may include varying the attendance targets
- Has been absent for pregnancy related reasons; or
- Has been absent due to bereavement.

Discretion can be requested at any point in the procedure e.g. before Stage 1, 2 or 3 of the Maximising Attendance procedure takes place. When deciding when to request discretion, Line Managers should consider the employee's absence record, the reason for absence, the expected length of absence and request discretion when they feel that it is most appropriate. In specific cases it may be appropriate to request discretion before the Stage 1 meeting e.g. an employee who requires a set time to undergo an operation/recovery time, or when more information is known about the absence and the employees expected date of return.

Where there is no specific date of return known/the reason absence is unclear or varied, the manager should meet with the employees to find out more about the absence and make an occupational health referral if required. If following the meeting further information is known about the employee's absence, discretion may then be requested.

Discretion can be applied in full or in part i.e. the Assessor & ERO/Head of Valuation Services can approve discretion of the full period of time applied for, or if approved in part they may approve to a certain date. If the employee has not returned by the stipulated date, and no further discretion has been requested or granted, Managers must give consideration to convening a formal Stage 1, 2, or 3 meeting as appropriate. Please refer to ABS/FORM/9.

## CLASSIFICATIONS OF ABSENCE

(The list of examples provided is not exhaustive)

### 1. Gastrointestinal Problems

Sickness and diarrhoea, IBS, gastric or bowel disease, ulcers, dyspepsia, hiatus hernia, Crohn's disease, cirrhosis, liver failure, obesity, alcoholism and drug abuse

### 2. Cardiovascular / Blood

Hepatitis, anaemia, neutropenia, heart disease of any kind, angina, circulation, vascular disease, arteriosclerosis, hypertension, varicose veins, cerebrovascular accident and stroke

### 3. Psychological

Anxiety, depression, nervous debility, post natal depression, chronic fatigue syndrome, traumatic stress disorder, stress reactions, schizophrenia and insomnia

### 4. Musculoskeletal

Broken bones, arthritis, neck and back pain or strain, sciatica, prolapsed intervertebral disk, degeneration of spine, osteoporosis, trauma, spondylolithesis, spondylitis and spondylosis

### 5. Respiratory

Viruses, colds, flu, bronchitis, asthma, glandular fever and chronic obstructive airways disease

### 6. Tumours / Cancer

Of any kind

### 7. Neurological / Endocrine

Migraines, headaches, epilepsy, multiple sclerosis, cerebral palsy, neuralgia, diabetes, thyroid disease and pancreatitis.

### 8. Genitourinary / Gynaecological

Hysterectomy, pelvic floor repair, miscarriage, renal disease, incontinence, cystitis, prostate disease

### 9. Skin

Dermatitis, eczema and psoriasis

### 10. Eye/Ear/Nose/Throat/Mouth

Deafness, ear infections Meniere's disease, rhinitis, nasal polyps, visual impairment, eye infections, cataract, glaucoma

### 11. Infectious Disease

Measles, meningitis, mumps, chicken pox and rubella

### 12. Hospitalisation / Surgical & Post Op

Of any kind