

CASE REPORT FOR STAGE 3 FINAL REVIEW MEETING

**IN LINE WITH THE NHSBT ATTENDANCE POLICY**

SICKNESS ABSENCE DETAILS

|  |  |
| --- | --- |
| **EMPLOYEE:**  |  |
|  |  |
|  |  |
| **PANEL MEMBERS:** |  |
|  |  |
|  |  |
| **MANAGEMENT:** |  |
|  |  |
|  |  |
| **DATE/TIME OF PANEL:** |  |
|  |  |
| **VENUE:** |  |
|  |  |
|  |  |
| **REPORT CREATED BY:** |  |
|  |  |
|  |  |
| **DATE CREATED:** |  |

**CONTENTS**

|  |  |  |
| --- | --- | --- |
|  | **Section** | **Page No.** |
|  | Name Abbreviation List |  |
| **1.** | Introduction |  |
| **2.** | Summary of Case |  |
| **3.** | Working environment and duties |  |
| **4.**  | Sickness Absence History |  |
| **5.** | Sickness management process |  |
|  | Stage 1 Formal Review |  |
|  | Stage 2 Formal Review |  |
| **6.** | Timeline (sequence of events) |  |
| **7.** | Conclusions |  |
| **8.** | Appendices |  |

**Name Abbreviation List**

*(use if case has involved a large number of people and you think it would be beneficial for the panel to have a quick overview of each employee’s initials, to help them when reading the MSOC e.g. WB – Wendy Baker – Head of HR Service Improvement)*

|  |  |  |
| --- | --- | --- |
| **Abbreviation** | **Name** | **Job Title** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**1. Introduction**

|  |  |
| --- | --- |
|  |  |
| Name:  |  |
| Job title: |  |
| Start Date in NHSBT: |  |
| Start date in current post: |  |
| Directorate: |  |
| Department: |  |
| Location: |  |
| Hours of work: |  |
| Band: |  |
| Assignment Number: |  |

**2. Summary of Case**

 *[Insert a summary of the case;*

* *What are you asking the panel to consider*
* *Brief overview of process to date e.g. when you started monitoring sickness*
* *When your employee was placed on the different stages*
* *Brief overview of feedback from OH which has led to the Stage 3 meeting*

**3. Working Environment and Duties**

*[insert details of your employee’s working environment and duties that you think are important for the panel to understand e.g. if reasonable adjustments have been made to duties what were the duties and what have been the adjustments etc and where relevant include any impact on team of sickness absence]*

**4. Sickness Absence History**

*[Insert details of the sickness absences and history which has caused the employee to be moved to stage 3 e.g. table of dates of sickness absences, reasons for sickness and number of days taken, to include all sicknesses from the start of the process so the ones that triggered to put them into Stage 1 onwards; or all sickness absence that show a either significant levels or patterns of absence that have put them into Stage 3]*

|  |  |  |  |
| --- | --- | --- | --- |
| **Absence Start** | **Absence End** | **Days Lost** | **Absence Reason** |
| 10/04/13 | 20/04/13 | 10 | Musculo-skeletal Other Joints, Lower Limb |

**5. Timeline**

*[Insert timeline/sequence of events which provides a basic overview to the panel of the* ***significant*** *dates of the management of the sickness absence process]*

*Example of timeline table below:*

|  |  |  |
| --- | --- | --- |
| **Date** | **Activity/Comments** | **Appendix Number** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**6. Summary/Conclusions**

*[Insert any details that you want to specifically draw the panel’s attention to in relation to following the process]*

 *[Conclude;*

* *What conclusions you have made in relation to the case*
* *Overview of case e.g. when it started, how long it has taken, confirmation Attendance policy processes have been followed and issues with ongoing impact on department*
* *Reason moving to Final Review meeting]*

### **8. Appendices**

*[Include where relevant any appendices;*

* *Occupational health reports*
* *Outcome letters for Stage 1 and Stage 2 meetings*
* *Invite to Stage 3 letter*
* *Documents in relation to any reasonable adjustments*
* *Other sickness absence documents if there have been any contentious issues (e.g. Return to Work interviews or Absence meetings where disagreements happened over trigger points etc)*
* *Job description (if relevant)*
* *Person specification (if relevant)*
* *Attendance policy (relevant pages)*

*If it is easier/preferred the list of appendices can be entered into a table, example below;*

|  |  |  |  |
| --- | --- | --- | --- |
| **Appendix Number** | **Appendix Title** | **Type of Document** | **Date of Document** |
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