

CASE REPORT

FOR ILL HEALTH RETIREMENT MEETING

**IN LINE WITH THE NHSBTS ATTENDANCE POLICY**

LONG TERM SICKNESS ABSENCE DETAILS

|  |  |
| --- | --- |
| **EMPLOYEE:**  |  |
|  |  |
|  |  |
| **PANEL MEMBERS:** |  |
|  |  |
|  |  |
| **MANAGEMENT:****HR LEAD** | Independent to both Management and Employee, role is to ensure management has followed due process fairly and has taken reasonable steps to help employee back into the workplace according to process and all support has been explored  |
|  |  |
|  |  |
| **DATE/TIME OF DISMISSAL MEETING:** |  |
|  |  |
| **VENUE:** | Face to face is preferable - If VIRTUAL – have all parties agreed to this?  |
|  |  |
|  |  |
| **REPORT CREATED BY:** |  |
|  |  |
|  |  |
| **DATE CREATED:** |  |

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**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;*

* *Brief overview of process to date e.g. when you started monitoring sickness*

NAME has been absent from work since (DATE) after being diagnosed and treated for a (MEDICAL CONDITION). During this period of absence (NAME) has been unfit for work in any capacity, despite OH referrals requesting if NHSBT can support with reasonable adjustments, consideration for redeployment. (NAME) also feels that they are not able to return to the role as a (JOB TITLE) in the (AREA) in any capacity.

OR

Name has returned to work for a short while on tailored adjustments, however despite the support in place (NAME) was unable to maintain regular attendance at work and went absent on (DATE) and has been unable to return to work since.

Adjustments has been discussed, however there is no adjustment that could be made that will allow her to return to her role. Redeployment has also been discussed. (NAME) Sally feels that they are unable to return in any role. During this time OH also confirmed that (NAME) was unfit for work

NAME is on nil pay.

All the meetings held with (NAME) were supported by HR and NAME was/was not supported by their union representative (NAME)

At a meeting on DATE and following the most recent medical OH report dated (DATE) confirms that EMPLOYEE NAME is “e.g permanently unfit for any work, and would recommend a referral to the ill health retirement process”

During this meeting (NAME) stated that they are keen to be considered for ill-health retirement. During the meeting we discussed the process for considering and applying for ill-health retirement.

We explained that if (NAME) was to submit an application for ill-health retirement, they would be invited to a meeting to formally end their employment with appropriate paid notice.

NAME has requested to apply for ill health retirement on the grounds that they are suffering with ill health and unable to return to their role in any capacity as confirmed by OH.

I am, therefore asking the panel to consider (NAME) suitability of employment and following the advice from OH.

The AW33E form has been completed and Part C has been completed by Occupational Health and they have submitted the application to NHS Pensions who then forward onto Medigold for a decision.

**3. Working Environment and Duties**

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

**4. Background of sickness absence**

*[Insert overview details of the case and process you have followed that has resulted in your employee being moved to IHR dismissal meeting;*

* *Details of the medical condition your employee is off with*
* *Details of when the sickness started*
* *Details of absence support meetings held and outcomes of those meeting*
* *Any relevant OH reports/recommendations*
* *Any reasonable adjustments provided*
* *Overview of the Formal Absence Review meeting (include different options discussed)*

**5. Timeline**

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

*Example of timeline table below:*

|  |  |  |
| --- | --- | --- |
| **Date** | **Activity/Comments** |  |
|  |  | Letter/document available upon request |
|  |  |  |
|  |  |  |
|  |  |  |

**6. Summary/Conclusions**

*[Insert your conclusions;*

* *Process followed to date*
* *OH report outcome from the last OH appointment*
* *Support offered*
* *Conclusions on reasonable adjustment*
* *Conclusions about likelihood to return to work*
* *Reason moving to IHR dismissal meeting*
* The most recent OH report is supportive of (NAME) pursuing ill health retirement and therefore I am seeking dismissal on the grounds of capability due to medical incapacity to enable (NAME) to progress their ill health retirement application.

*Appendices are not required for an ill health retirement dismissal meeting.*

When referring to letters/documents, you don’t need to include them in the report/Appendices, however, please reference that they are available upon request.

### **7. Appendices – letter and documents available upon request.**

*[Include where relevant any appendices;*

* *Occupational health reports*
* *Outcome letters for any relevant meetings held*
* *Outcome letter for Formal Absence Meeting*
* *Invite to IHR dismissal meeting letter*
* *Other sickness absence documents if there have been any contentious issues (e.g. disagreements over reasonable adjustment or occupational health advice etc)*
* *Documents in relation to any reasonable adjustments*
* *Job description (if relevant)*
* *Person specification (if relevant)*
* *Attendance Absence 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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