



Lowerhouse Junior School, Burnley

SICKNESS ABSENCE PROCEDURE (LONG TERM)	
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1. PURPOSE

1.1 This model procedure provides a framework for schools to manage cases of long term sickness absence. The procedure is intended to give clear guidance to all parties in dealing with long term absence.

1.2 The definition of a long term absence is one lasting a minimum of 28 calendar days.

2. APPLICATION

2.1 This procedure has been adopted by the Governing Board and forms part of the contract of employment of all staff employed in Lowerhouse Junior School.

2.2 This procedure has been written on the understanding that the day to day management of attendance is undertaken by the Headteacher (or nominated person), and dismissal decisions are taken by the Attendance and Dismissal Committee of the Governing Board. However, in accordance with the provisions of the Education Act 2002 and its associated School Staffing (England) Regulations 2003 and 2009, the Governing Board may elect to delegate the power to make dismissal decisions to the Headteacher. If this is the case, there will be no Attendance and Dismissal Committee. Instead the dismissal decision will be taken by the Headteacher, and the appeal referred to the Appeals Committee of the Governing Board. For further details, see Appendix B.

2.3 If the responsibility for dismissal decisions rests with the Headteacher, to preserve the integrity of the managing attendance process, the Governing Board should delegate the responsibility for the day to day management under this procedure to another member of the School Leadership Team, thereby leaving the Headteacher available to consider what action should be taken at the end of the formal procedures, including dismissal.

2.4 In these cases, any reference to the role of the Headteacher within this procedure should be taken to mean the member of the School Leadership Team responsible for the day to day management of attendance (identified with an asterisk (*) throughout this procedure).

2.5 In this school, the responsibility for dismissal decisions rests with the Attendance and Dismissals Committee of the Governing Board.

2.6 Where any action under this procedure may have implications for an employee's salary or their continued employment, they should be advised to seek advice from their trade union. At any meeting convened under this procedure, the employee may be accompanied by a work colleague or trade union representative.

2.7 Where the absence(s) is due to a condition that could be classed as a disability under the Equality Act 2010, advice should be sought from a member of the Schools HR Team in relation to the procedure.

2.8 Nothing in this procedure shall prevent an employee from exercising their statutory rights under employment law to register a claim with an employment tribunal.

2.9 The School processes personal data, including special categories of data, collected and processed during the absence management process in accordance with the School's Data Protection Policy. In particular, data collected as part of the absence management process and any subsequent stages of action under the Long Term Sickness Absence Procedure is held securely and accessed by, and disclosed to, individuals only for the purposes of completing the Long Term Sickness Absence Procedure. Inappropriate access or disclosure of employee data constitutes a data breach and should be reported in accordance with the school's Data Protection Policy. It may also constitute a disciplinary offence, which will be dealt with under the school's Disciplinary Procedure.

2.10 In the case of a 'mental health emergency' it may be appropriate to share information with the relevant emergency service and/or next of kin. A mental health emergency is defined by the Information Commissioners Office as a "situation in which you believe that someone is at risk of serious harm to themselves, or others, because of their mental health. This can include the potential loss of life". There may be some situations when it is not appropriate to share information with the employee's next of kin and therefore judgement would need to be called in each situation. More information can be found on the ICO's website here [Information sharing in mental health emergencies at work](#) | ICO. Advice can also be sought from the Schools HR Team.

3. NOTIFICATION OF ABSENCE AND CONTACT ARRANGEMENTS

3.1 All employees must follow the notification procedure for reporting sickness absence as set out by the Headteacher* or their nominated contact person. On the first day of absence, employees must give brief details of the reason for absence, the date the absence commenced, the likely duration of the absence, whether it is related to an accident or injury at work and whether any medical attention has been sought.

3.2 Employees must ensure that they submit fit notes in a timely manner to cover their absence continuously on the 8th calendar day of absence onwards. The school must make internal arrangements to ensure that absence is recorded correctly using the School's absence recording system and that the appropriate documentation relating to sickness absence, including fit notes, is obtained and maintained.

3.3 In all cases of long term absence, it is important that the school maintains regular contact with the absent employee in relation to their absence, including, if necessary and by agreement, visit the employee, unless exceptional circumstances apply. The purpose of such contact is to enquire as to the employee's health and recovery, to ascertain whether a return to work is likely in the near future and to identify any adjustments that could be made to facilitate an earlier return to work.






3.4 Any contact with the employee should be handled sensitively to avoid the perception that the employee is being pressurised or harassed. Appropriate informal social contact should also be encouraged, which will ensure that the employee does not feel isolated. It is a matter for the Headteacher* to determine who would be the most appropriate person to maintain contact with the employee.

3.5 Employees have a responsibility to maintain regular contact with the Headteacher* or nominated contact person during periods of long term sickness absence to update the School on progress and likely duration of absence so that support can be provided for the employee as appropriate and to enable the Headteacher to plan for cover arrangements.

4. MEDICAL REFERRAL TO THE OCCUPATIONAL HEALTH

4.1 The responsibility for the management of long term absence cases rests with the School, supported by the Schools HR Team. Each school will need to ensure that all employee absence is monitored and will need to ensure that they are able to supply the information required to make a referral to the Occupational Health (OH).

4.2 A referral for a medical opinion from OH should be made in the following circumstances:

-  Where an employee has been absent from duty for four weeks or more due to sickness; or
-  If the employee has been absent from duty with stress, depression, anxiety or any other mental health condition, the referral should be undertaken when the first fit note is received; or
-  If the employee is absent with an industrial injury or other work-related condition, a referral should be undertaken immediately; or
-  There have been a number of shorter periods of sickness, (see Short Term and Repeated Absence Procedure); or
-  The Headteacher*/Governors of the school have justified concerns about the ability of the employee to carry out their duties because of a medical condition,

4.3 The requirement for an OH assessment should be made, taking into consideration the circumstances of the case. In certain circumstances, it may be appropriate just to monitor the case over a longer period of time rather than referring it to OH, e.g. post hysterectomy, broken bones, end dated or terminal illness (see Absence Management Guidelines).

4.4 It should be noted that, in cases where employees who have contact with children suffer from pulmonary tuberculosis, epilepsy, psychiatric disorders or other such conditions, action should be taken to refer the employee to OH without delay. Paragraph 4.12 of this procedure provides further information on action to take in these circumstances.

4.5 Where it is decided that the employee should be referred to OH, the Headteacher* or nominated person should contact the employee to inform them of the referral and its contents and to obtain the employee's consent, before the referral is made. In all cases, the employee should be informed that they may find it helpful to seek the advice and guidance of their trade union.

4.6 In the case of teachers, Conditions of Service for School Teachers in England and Wales apply. These national conditions state that to be entitled to sick pay, it is a requirement for the employee to submit to medical examination if requested to do so. The same requirement applies to support staff as stipulated by the NJC National Agreement on Pay and Conditions.

4.7 The school should complete an online referral via the OH online system. The prime responsibility for initiating the referral process rests with the School. The referral should contain factual details and provide details of the illness, the duties and responsibilities of the postholder, any problems which have come to light in undertaking the duties and responsibilities as a consequence of the medical condition, the likely length of absence, possible adjustments to enable a return to work and any other relevant information. In completing the referral, the manager should bear in mind the fact that the referral may be seen by the employee at a later date.

4.8 OH may consider it appropriate for a medical report to be sought from the employee's own medical practitioner. If this is the case, the employee will be asked to sign a consent form, sent by OH, which will set out their rights under the Access to Medical Reports Act 1988, including the right to see the report prior to it being sent to the Occupational Health Adviser.

4.9 An OH appointment will normally be arranged within 2 weeks of the referral. OH will notify the employee of the date of any appointment once the appointment date has been set. The appointment will normally take place over the telephone but face to face appointments may be available upon request by the referring person. The Headteacher will be able to track the progress of the appointment on the OH online system.

4.10 As stated in paragraph 4.6, all school employees are required, under their conditions of service, to attend a medical consultation arranged by OH and failure to do so without a reasonable explanation being provided to the Headteacher or nominated person, or failure to notify School and OH of intended non-attendance may lead to formal disciplinary action, or may lead to decisions being taken on the basis of the existing level of knowledge about the absence. It may also disqualify employees from the benefits of the occupational sick pay scheme, in accordance with their conditions of service.

4.11 Following the OH appointment, OH will prepare a report, which will be available on the on-line system. A copy of the report should be provided to the employee by the Headteacher* if requested.

4.12 Medical Disorders (teachers and other employees having contact with children)

4.12.1 In cases where a teacher is found to be suffering from a contagious disease or a condition such as pulmonary tuberculosis, epilepsy, a psychiatric disorder or other such condition, the matter should be referred to OH following the procedure outlined above. The employee should not be allowed to work until OH has given clearance.

4.12.2 In some cases, the employee's medical practitioner may sign them off as being fit to work but the employer may disagree. In these cases, the advice of the OH may be sought.

4.12.3 Headteachers* must take immediate action when they consider a teacher may have become medically incapable of performing teaching duties if this may put at risk the health, education, safety or welfare of pupils.

5. SICKNESS ABSENCE REVIEW PROCEDURE







5.1 Depending upon the circumstances of the case, a meeting may be convened by the Headteacher* to discuss the content of the OH report, support that can be provided to the employee to aid their recovery and the implications of the employee's continued sickness absence. At this meeting, the Headteacher* may be accompanied by a representative of the Schools HR Team. The employee has the right to be accompanied by their trade union representative or a work colleague at this meeting. In exceptional circumstances, the Headteacher* may not be present at this meeting and the meeting may take place away from the school premises, or outside of school time.

5.2 Normally, the outcome of the medical referral and any subsequent discussion with the Headteacher* will be one of the following:







- i. the employee is fit to return to the full duties of the post, therefore a return to work date is agreed;
- ii. the employee is fit to return to the duties of the present post subject to reasonable adjustments having been implemented and/or the benefit of a rehabilitation programme, possibly through a phased return to work and a return to work date is agreed. Recommendations regarding reasonable adjustments may arise from the OH report or from a fit note;
- iii. further time is required for recovery and a further meeting is arranged in due course to review progress;
- iv. the employee is permanently incapable of discharging efficiently the duties of the present post, but fit for other comparable employment within the school (where this is available) (see paragraph 6 below);
- v. the employee is permanently incapable of discharging efficiently the duties of the present post or any other comparable employment within the school (where this is available) (see paragraph 6 below);
- vi. the matter should be referred to the Attendance and Dismissals Committee of the Governing Board or Headteacher (where the Governing Board has delegated the power to make dismissal decisions to the Headteacher) (see paragraph 8 below). If this is the case, the employee should be informed that one option available to the Attendance and Dismissals Committee is the dismissal of the employee on the grounds of capability owing to ill health.

5.3 Where an employee has a disability, the Headteacher* should fulfil their duty to make reasonable adjustments under the Equality Act 2010 to ensure that the employee is not substantially disadvantaged in their ability to attend and fulfil their work. Consideration should be taken of any advice from OH in respect of the adjustments recommended. The Headteacher* should also seek and consider advice from the Schools HR Team. See Section 6 of the Guidelines for Managing Sickness Absence in Schools for further information.

5.4 Where it is apparent from the OH report that the employee will remain absent from duty for some time but may return, the Headteacher* should discuss the matter with a member of the Schools HR Team in order to determine what action could be taken. Further sickness absence review meetings may be arranged with the employee as appropriate to discuss the options available, which include:

-  continuation of monitoring;
-  phased return to work. The feasibility of this should be considered by the Headteacher*. If a school is part of the County Council's Insurance Scheme for supply cover, the phased return must be arranged in agreement with Schools HR Team, and in consideration of the advice from OH and/or the employee's medical adviser;
-  reasonable adjustments made to the employee's duties and responsibilities;
-  retraining;
-  any other reasonable adjustments recommended by OH or on the fit note.
-  the possible application for ill health retirement benefits.

5.5 In cases of more prolonged absence, where OH continue to be unable to make any firm prognosis regarding return to work or ill health retirement, a meeting should take place with the employee to discuss the findings of the medical report and the implications of their continued absence, including the possibility of a referral of the case to the Attendance and Dismissals Committee. Advice should be sought from the Schools HR Team and the employee informed of their right to be accompanied at the meeting by a trade union representative. In reaching a decision, consideration must be given to the following:

-  the available medical advice; - the nature of the illness;
-  the pattern of absence;
-  the overall absence record;
-  the likelihood of a return to work in the foreseeable future;
-  the operational needs of the school; - the impact on the workload of other employees and the continued capacity to cover the absence;
-  any implications arising from the Equality Act 2010

5.6 Industrial Injury


5.6.1 Where an employee is absent from duty due to an accident which arose out of, and in the course of, their employment, this may be treated as an industrial injury. The Headteacher must consider each case on an individual


basis and make a decision on whether the absence is due to an industrial injury. Where there is any doubt as to whether it should be treated as an industrial injury, the Headteacher should seek advice from the Schools HR Team.

5.6.2 The Headteacher should inform the employee that the case is held to be an industrial injury and should update the online absence system to indicate this, including inputting the injury on the online accident reporting system. The Headteacher should ensure that any relevant statutory paperwork is completed e.g. referral under RIDDOR etc, in consultation with the employee.


5.6.3 The Headteacher will inform the employee, that the absence is being viewed as an industrial injury (without prejudice).

5.6.4 **Teachers**

 Paragraph 9 under Section 4 of the Conditions of Service for School Teachers in England and Wales outlines the provisions relating to absence arising from accident, injury or assault at work. These provisions apply equally to absence caused by both physical injury and clinically diagnosed psychological injury.

 If the case is held to be an industrial injury, teaching employees are entitled to full pay for a maximum period of 6 months, which is not deducted from their normal sick pay entitlement, though such absences are reckonable for entitlement to Statutory Sick Pay.

5.6.5 **Support Staff**

 If the case is held to be an industrial injury, support staff employees are entitled to full pay for a maximum period of 9 months, after which time the employee will receive their half pay entitlement under the Occupational Sick Pay Scheme.

5.7 Absence Caused by Negligence

5.7.1 **Teachers**

Section 4, Paragraphs 11.1-3 of the Conditions of Service for School Teachers in England and Wales states the following:

11.1 If the absence of the teacher is occasioned by the actionable negligence of a third party in respect of which damages are recoverable, they shall advise the employer forthwith and the employer may require the teacher to refund a sum equal to the aggregate of sick pay paid to them during the period of disability of such part thereof as is deemed appropriate, but not exceeding the amount of the damages recovered. In the event of the claim for damages being settled on a proportionate basis, the employer will require full details and will determine the actual proportion of sick pay to be refunded by the teacher.

11.2 If the employer, in consultation with the governing body as appropriate, are of the opinion that the disability which has occasioned the teacher's absence from work is due to their misconduct, or if the teacher has failed to observe the conditions of this scheme, or has been guilty of conduct prejudicial to their recovery, the payment of any sick pay under the scheme may be suspended by the employer. In any such case the employer shall inform the teacher of the grounds upon which the payment of sick pay has been suspended. They will then be given the opportunity to submit their observations and to appear (accompanied by a representative if they so wish) before the Grievance Committee of the Governing Board. The Committee will thereupon decide whether the disability was due to the conduct of the teacher or whether they have failed without reasonable cause to observe the conditions of the scheme, or has been guilty of conduct prejudicial to their recovery, in which case the teacher shall forfeit their right to any payment or further payment of sick pay in respect of that period of absence.

11.3 Sick pay shall not be paid in a case of accident due to active participation in sport as a profession unless the employer decides otherwise, though Statutory Sick Pay may be payable.

5.7.2 **Support Staff**

Paragraph 10 of the NJC National Agreement on Pay and Conditions of Service states the following:

10. If an employee abuses the sickness scheme or is absent on account of sickness due or attributable to deliberate conduct prejudicial to recovery or the employee's own misconduct or neglect or active participation in professional sport or injury while working in the employee's own time on their own account for private gain or for another







employer sick pay may be suspended. The authority shall advise the employee of the grounds for suspension and the employee shall have a right of appeal to the appropriate committee of the authority. If the authority decide that the grounds were justified then the employee shall forfeit the right to any further payment in respect of that period of absence. Repeated abuse of the sickness scheme should be dealt with under the disciplinary procedure.

6. PERMANENT INCAPACITATION AND TERMINAL ILLNESS

6.1 In cases where OH and the employee's medical adviser agree that the employee is permanently incapable of efficiently carrying out the duties and responsibilities of their present post, or any other comparable employment within school (where this is available), the Headteacher* should arrange a meeting with the employee and their representative to discuss the implications of that decision. In these circumstances, the Headteacher* should seek and consider advice from the Schools HR Team.

6.2 Where OH recommends ill health retirement and the employee decides that they wish to pursue ill health retirement, the procedure in paragraph 7 will be followed. In these circumstances, the employee should be made aware that by applying for ill health retirement, they are confirming that they consider themselves to be permanently unfit for gainful employment until retirement age. If an application for ill health retirement is made but is unsuccessful, the case should then be referred to a meeting of the Attendance and Dismissals Committee to consider the termination of employment on the grounds of capability owing to ill health. Employees should be encouraged to consult their trade union, so they are fully aware of the implications of their application.

6.3 Where the Occupational Health Adviser determines that the employee is permanently incapable of discharging the duties of the present post efficiently but is fit for comparable employment within school (where this is available), consideration should be given to the School making alternative arrangements, in consultation with OH/Schools HR Team, by discussing:

-  job restructuring;
-  relinquishing some responsibilities;
-  changing to job share or part-time work;
-  retraining;
-  modifications to the work place or to working practices;
-  the use of technical aids.

Such alterations should also be considered under the provisions of the Equality Act 2010 to assist the employee in gradually returning to full time employment. Where appropriate, any proposal in relation to alternative duties should be discussed with the Schools HR Team and with OH (if necessary) before the amendment to the role is made.

6.4 If suitable alternative employment within the school is identified and offered, but is rejected by the employee and they are in agreement with the medical opinion with regard to permanent incapacity, the matter should be referred to the Attendance and Dismissals Committee, who may decide to terminate the contract of employment on the grounds of capability owing to ill health. In reaching a determination on the case, the Attendance and Dismissals Committee should consider whether the alternative employment which has been offered was comparable and suitable. The employee must also be made aware that refusal of the offer of comparable employment would result in no automatic entitlement to pension benefits being paid upon dismissal.

6.5 Where it is felt there are no suitable alternative employment or the employee refuses to accept the medical advice or there is continuing disagreement, the matter should be referred to the Attendance and Dismissals Committee, who may decide to terminate the contract of employment on the grounds of capability owing to ill health.

6.6 School employees are not covered by the County Council's Redeployment Agreement. Therefore the only option for the consideration of alternative employment is within the employee's own School.

6.7 Terminal Illness

This procedure may be used for dealing with cases of terminal illness. Advice on managing cases of long term absence due to terminal illness can be obtained from OH and the Schools HR Team, including advice and guidance in

relation to financial entitlements and pension issues. In addition, specific guidance for managing cases of critical or terminal illness can be found within the Guidelines for Managing Sickness Absence on the Schools Portal.

NOTE:

(1) In this context 'permanently incapable' means incapable of discharging the duties of the post until the employee's normal retirement age.

(2) Alternative/comparable employment is defined as employment in which, when compared to an employee's present employment, the contractual provisions are the same or differ only to an extent that is reasonable. The following factors will be taken into account: the nature of the employee's ill health or infirmity of mind or body, the contractual provisions as to location, remuneration, hours of work, holiday entitlement, sickness or injury entitlement and other material terms that do not differ substantially from those of the employee's present employment.

7. ILL HEALTH RETIREMENT

7.1 Teachers' process

7.1.1 Any teacher considering an application for IHR benefits should be advised to consult with their trade union, before submitting their application. In making such an application, the teacher should be reminded that in doing so, they are indicating to their employer that they believe they are permanently unfit to teach.

7.1.2 The application process for ill health retirement is contained within the Ill Health Retirement Guidance for Teachers document.

7.1.3 If approval has been given by Teachers' Pensions for the teacher to retire on IHR grounds, the Headteacher/Manager should arrange a mutually convenient date of retirement with the teacher and the school. It should be noted, however, that in granting infirmity benefits, the teacher has been deemed permanently unfit to teach and the provisions of the Teachers' Regulations then apply. Therefore, the date of termination should be as soon as possible after the granting of infirmity benefits without payment in lieu of notice. If the date of retirement cannot be mutually agreed, the termination date will be 30 days after the date that the award of IHR benefits is notified to the Employer.

7.1.4 The teacher has a right to appeal against a decision of Teachers' Pensions in relation to their IHR retirement application. The written appeal should be directed to Teachers' Pensions. For further details of the IHR appeals process, visit the Teachers' Pensions website at www.teacherspensions.co.uk.

7.2 Support Staff process

7.2.1 The application process for ill health retirement for support staff is contained in the document Ill Health Retirement Guidance Support Staff in Schools.







7.2.2 If the application for ill health retirement is successful, the effective date of termination should be as soon as possible after the granting of IHR and not later than 30 days after the date that the award of IHR benefits is notified to the Employer, without payment in lieu of notice. If the employee is not granted IHR, the matter should be referred to the Attendance and Dismissals Committee, where termination of the employee's contract of employment should be considered on the grounds of capability owing to ill health.

7.2.3 Members of the LGPS have a right of appeal against any decision made by their employer regarding their pension rights. Further details regarding the appeals process can be found on the Your Pension Service website www.lppapensions.co.uk.

8. ATTENDANCE AND DISMISSALS COMMITTEE

8.1 Where it is decided that all alternatives have been exhausted and termination of the employee's contract of employment should be considered, advice must be sought from the Schools HR Team.

8.2 Circumstances in which consideration may be given to terminating an employee's services include:

-  where OH determine that an employee is permanently unfit to carry out the duties of their present post or any other comparable employment within school (where this is available), and the employee does not wish to pursue ill health retirement;
-  where OH determine that an employee is permanently unfit to carry out the duties of their present post but is fit for other comparable employment within school (where this is available) and all other employment alternatives have been considered, including modifications to the work place and/or working practices, but no such comparable employment has been identified or it has been rejected by the employee;
-  where the employee does not agree with the medical opinion with regard to permanent incapacity for work;
-  where the employee has been advised to seek ill health retirement on the basis of medical advice but refuses to do so;
-  where OH is unable to reach a decision on permanent incapacity for work;
-  where neither OH nor the employee are able to indicate a return to work date in the foreseeable future and the School is unable to continue to sustain the absence.

8.3 In these circumstances a report will be made to the Governors' Attendance and Dismissal Committee or Headteacher (where the Governing Board has delegated the power to make dismissal decisions to the Headteacher). The Committee will consider whether to monitor the case further or to take a decision to terminate services on the grounds of capability owing to ill health, having regard to the circumstances of the case, and the action taken during the Sickness Absence Review Procedure. The procedure to be followed at the meeting is outlined at Appendix A.

8.4 Any appeal against dismissal by the Attendance and Dismissals Committee will be heard by the Appeals Committee. The procedure to be followed at the meeting is outlined at Appendix A. The appeal outcome will be final. There will be no further right of appeal against dismissal.

9. EXTENSION OF SICK PAY ENTITLEMENT (TEACHING STAFF ONLY)

9.1 Under the Conditions of Service for School Teachers in England and Wales, Section 4, paragraph 2.2 provides the employer with discretion to exceed the minimum entitlement for sick leave in individual circumstances.