Managing Return to Work following mental health related sickness absence: A toolkit for SMEs Employer

Getting Started

Step 1: Dealing with initial absence
Step 2: Developing knowledge and skills
Step 3: Maintaining communication throughout absence
Step 4: Preparing for return to work
Step 5: Having a Return to Work conversation
Step 6: Keeping healthy and productive at work

Where to go for further information
Information on stress, anxiety and depression
Interactive materials for Step 1
Interactive materials for Step 2
Interactive materials for Step 3
Interactive materials for Step 4
Why does it matter to your business?

KEY FACTS

- One in six workers are affected by stress, depression or anxiety.
- Sickness absence can cost your business between £1,205 and £1,560 per employee, per year.
- The longer someone stays off work, the less likely they are to return.
- While someone is off, it usually means that others in the business take on more work. This may mean others are doing longer shifts or adding work to their pile.

Getting your employee back to working well is key for you, for the employee and the team.

Did you know that the way an employee is treated during their absence and their initial return has a major impact on their likelihood of returning to work?

On hearing that an employee has stress, anxiety or depression, many employers/managers have the initial reaction – “I feel out of my depth” or “I don’t know where to start, it is all too complicated, and I don’t want to make things worse.”

BUT there are some easy things that you can do to support an employee in this situation. This guide will help you with this.

Take 20 minutes to read through the six simple steps in this document and you could save over a £1000 in sick pay, insurance pay, lost productivity, recruitment costs. You could also potentially save one of your employees from a life on incapacity benefit.

What are stress, anxiety and depression?

Everyone’s experience of mental health is slightly different. People with stress, anxiety or depression may display different signs or symptoms and some might not show any at all. Often, we cannot tell by people’s behaviour alone. A more important sign is a change in the person’s behaviour.

Some signs that might indicate that something has changed for that individual include:

- **Behavioural signs** - struggling with workload, low levels of concentration and focus, difficulty in organising, low productivity, negative attitude, changes in motivation.
- **Emotional signs** - feeling anxious or irritable, mood changes, changes in how they interact with colleagues, excessive emotion, feeling isolated or socially withdrawn.
- **Physical signs** – tiredness, having sleepless nights, increased drinking and/or smoking, not feeling hungry, headaches.
How do stress, anxiety and depression affect work?

Mental ill-health does not automatically mean poor performance. Many employees with mental health problems perform well at all levels in organisations. It may just be a case of supporting them and making adjustments to their job (where possible). First of all, the key thing is to have an open culture about mental health. Another important factor is to recognise the signs early on.

Remember it is the change in their behaviour not the behaviour itself. Some signs include being repeatedly late for work, short spells of absence, making mistakes, challenging decisions, withdrawing from the team, or forgetting to complete tasks.

For more details on signs and symptoms of stress, anxiety and depression, and the possible impact on work see the Mind website.

What causes mental ill-health?

- It can happen suddenly, as a result of a specific experience or life event
- It can also happen as a result of pressures that have accumulated over time
- It can be linked to another illness such as back pain or heart disease
- Sometimes there is no obvious reason

Can work cause or exacerbate mental ill-health?

The causes of stress, anxiety and depression are often complex; but, for some people, work can play a part. The Health and Safety Executive’s Management Standards outline six aspects of work that can cause stress, if they are not properly managed. See the Health and Safety Executive website for more information.

However, overall, research has consistently shown that work is good for our health so getting back to work is important – as long as the work is well designed and managed.

WHAT TO DO:

The manager’s role in identifying mental health problems in employees:

Individuals need an open and safe environment to be able to talk through any mental health problems they are having. If you see a change in a colleagues’ normal behaviour that persists for more than 2 weeks, don’t ignore it. Talk to the employee; maybe say that you have noticed some changes in their behaviour and ask if they would like to talk about it.

The manager’s role in supporting an employee who takes sick leave due to mental health problems:

An employee’s manager is often the first point of contact when they are unwell and is responsible for the day-to-day management of the employee. Research shows that how the initial period of sickness-absence is managed can impact how much time an employee takes off work. It also affects how they cope on their return and whether they are able to stay at work. This is not about additional skills, it is about good management plus extra empathy, kindness and patience.
The role of professional support including Human Resources (HR), Occupational Health and external services:

Many small businesses do not have a dedicated HR function. This guide is designed to help you to handle the absence and return yourself. However, if your employee’s absence is recurring, goes beyond four weeks, or is particularly challenging to manage, you may want to seek external professional advice. See where to go for further information in this document.

Your business may have an internal Human Resource professional. It may have access to Occupational Health services, depending on the type of insurance you have. If so, this guide can be used alongside these services’ support and guidance.

USING THIS GUIDE

This guide introduces six steps to help you support your employee back to work with:

<table>
<thead>
<tr>
<th>Key facts</th>
<th>To do’s</th>
<th>Examples of what to say</th>
<th>Watch outs</th>
</tr>
</thead>
</table>

Templates  
Checklists  
Exercises
Step 1: Dealing with initial absence

KEY FACTS:

- People often find it difficult to talk about mental ill-health and sometimes do not recognise it in themselves. In severe cases of mental ill-health, an employee may feel numb and unable to ask questions or for help.
- It is common for an employee experiencing mental ill-health to take a series of isolated absences of fewer than 7 days, reporting a variety of symptoms. Keep a clear record of everyone’s absences so that you spot any patterns. This gives you a chance to support people before the absences become longer. Examples of how to record absence can be found <CIPD> and <HSE>

WHAT TO DO:

- **Record the employee’s absence.** At this stage, you need to know the date and reason for absence. Employees can self-certify their absence up to 7 days without the need to provide a Fit Note (formerly sick note) from their GP.
- **If they do not contact you, contact them** ([see example email]).
  - Send them a note/text/flowers, something meaningful to them.
  - Give them a call to check-in to see how they are.
  - Make sure that any communication at this stage is about the employee and their health rather than when they are coming back.
- Prioritise the employee’s recuperation and getting better at this stage, rather than their return to work. If they come back too soon, they are likely to need further time off work.
- **Share the employee guide** to help them during their absence and their preparation for returning to work. If possible, offer that someone (HR professional or colleague) sit down and go through the employee guide: this is not to ask questions, but to assist the person’s understanding of and engagement with the guide.

WHAT TO SAY to the employee:

- We are sorry to hear you are feeling unwell, we are thinking of you.
- Take time to look after yourself.
- Could we arrange a time to have a quick hand over of outstanding work – that way you can concentrate on getting better and we can cover your work while you are off.
- Let us know if there is anything you need and if we can do anything to help you.
- Let us know how and through whom you want to communicate with us.
- What, if anything, would you like to be shared with others about your reasons for being absent.
Do NOT SAY to the employee:

- Where did you put x/ y/ z?
- I know you are off, but could you just answer this one question...
- When are you going to be back? (They are unlikely to know at first. This question would be better in week 2 or 3 if they are not yet back.)

WHAT TO SAY to others/colleagues:

Employees are often nervous about telling others about their illness and are reluctant for details to be shared with colleagues. **You must not share details of the employee’s health problems without their consent.** Sharing sensitive personal data without consent creates a variety of employment law and data protection risks.

If the individual would like their reasons for absence kept confidential you could say: “[employee’s name] has been feeling unwell and is taking some days off to get better. I am speaking to them/ will contact them early next week to see how they are and then we will know more.”

TEMPLATE LETTER/EMAIL:

Example email to edit and send to an employee when they have not notified you of their absence.

CHECKLIST:

A checklist of things to say on a telephone conversation with an employee when they have not notified you of their absence.

WATCH OUT: What if the manager has contributed to the absence?

It is sometimes the case that an employee feels that their mental health condition has been caused or exacerbated by the manager. In these cases, the employee and/or manager should nominate an alternative person as a contact point. This could be a line manager from a different part of the business, or a colleague trusted by both parties.
Step 2: Developing knowledge and skills

Managing an absent and returning employee can be difficult, especially when there are many pressures and demands on your time. Bear in mind that you do not need to assume a medical expert role: your responsibility is to manage the employee through their absence and return.

The way you behave during your employee’s absence and on their return can have a big impact on whether the return is successful or not.

TO DO:

- **Look after the rest of the team**
  - Think carefully about how you cover the absent person’s workload/tasks while they are off work. Consider the potential impact on other team members. This may affect how they feel about the employee on their return.
  - Check what you can share with the team. Do not share information about the person’s health without gaining their consent.
  - If the absence is work-related, explore how the rest of the team/ organisation are coping with similar pressures. As part of this, you could hold a meeting to discuss the six areas set out in the Health and Safety Executive’s Management Standards. These outline aspects of work that can cause stress, if they are not properly managed. See the Health and Safety Executive website to find out more.

- **Develop your managerial skills**
  - There are some simple things that you can do to develop your ability to have open and constructive conversations with employees who are suffering mental ill-health. These include:
    - **Reflect on your behaviour as a manager**
      - Guidance (supported by the CIPD, HSE and Healthy Working Lives) identifies some important do’s and don’ts. Use these to consider what you could do to improve the employee’s chances of a successful return.
      - See the CIPD guidance for further information (look at the checklist on page 5).
    - **Prepare for open conversations.** Tips and tools for having an open conversation.
    - **Put yourself in your employee’s shoes.** See this exercise designed to improve perspective taking. Managers who are able to put themselves in their employee’s shoes are better able to support their employees’ wellbeing.

- **Look after yourself**
  - When you are a team member down this can be difficult for your business. Here are some resources aimed at looking after yourself.
Step 3: Maintaining communication throughout absence

KEY FACT:

Managers are often reluctant to contact employees while they are off work with mental ill-health. They may be concerned their contact may be unwelcome, that it may make the situation worse. Or they may not know what to say. However, maintaining contact throughout sickness absence improves the likelihood of the employee returning to work. It can help relieve the anxiety of returning to work for the employee and can help you as the employer with your work planning.

WHAT TO DO:

- After 7 days, request Fit note (previously called the sick note) if one has not sent by the employee (see example email below).
- Consider carefully the content of the Fit Note and ensure that it is safely filed
- Remember to keep in touch with the employee in the ways you agreed with the employee. Check-in with them at regular intervals. If you have not yet agreed how you will keep in contact, see the template in step 1.
- If the absence progresses, the following options are open to you:
  a. Request a Human Resource Professional or Occupational Health professional to review the situation. See the NHS Health at Work Network website for the NHS Occupational Health support, the Society of Occupational Medicine website for more information, and the Chartered Institute of Personnel Development website for further information.
  b. After 4 weeks absence, you can refer the employee to the Fit for Work services. Fit for Work is a voluntary service that offers employees access to occupational health services, which is available to a worker after they have been off for four weeks or more due to sickness. See the Fit for Work services website for more information.
  c. Request to liaise with GP (see example email below). You can write to the employee’s GP, providing details of the role and asking them to consider the impact of return. Please note, GPs will only act with the consent of their patient. Many GPs do not have expertise in employment matters or occupational health. So, GPs may be reluctant or unable to give detailed advice.

WHAT TO SAY:

Using the knowledge and skills developed in Steps 1 and 2, continue to keep in contact with the employee throughout their absence. Make sure you do this in the way you have agreed (i.e. via email, phone, directly or via a trusted colleague).

The following templates provide suggested text for emails or letters that you to edit and send to your employee as appropriate. If you haven't already done so, you can send the employee guide.

TEMPLATE EMAIL/LETTER:

Example email to edit and send to the employee to request the fit note and information from GP.

TEMPLATE EMAIL/LETTER:

Example email to edit and send to the GP to request information.
Step 4: Preparing for return to work

KEY FACTS:

- When a return to work fails, it is often because people come back to work and resume their full workload too soon.
- There are a number of things that have been found to be helpful to managers who are managing the process. These can also improve the experience for the returning employee. Your employee is the best person to tell you what they need in order to come back to work safely. However, if you have prepared some thoughts too, it will be easier to reach a more constructive solution.
- While there are some things we cannot change about work, there are some things that can be easily adjusted, at least in the short term, to help employees. Most adjustments cost little or nothing to implement, they just require some time to make a change in a process or task.

WHAT TO DO:

- Reflect on the knowledge and skills you have developed from Step 2 of this guide.
- Take time to think about what the employee’s role involves. Think about what the priorities are. Consider whether there are any schedules/ tasks/ ways of doing things that can be changed.
- Consider work adjustments. Don’t pre-judge what the employee needs but do think about how you could change the way they work, if you need to. Identify some possible adjustments that could be put in place; and consider how long you, as a business, could accommodate these. See exercise.
- Take time to plan the employee’s return to work. See the checklist.
- Prepare for the return to work conversation.

EXERCISE:

Identifying work priorities.

EXERCISE:

Reviewing example adjustments to help formulate ideas.

CHECKLIST:

Preparing for the employee’s return to work.

CHECKLIST:

Preparing for the return to work conversation.
WATCH OUT: One size does not fit all

Everyone’s experience of mental health is different. Everyone’s work is different. Just because something has worked before, does not mean it will work this time.

WHAT TO SAY:

Dos

✓ We are looking forward to welcoming you back. You have been missed.
✓ Take some time to think about what will be helpful to you on your return: what do you need us to do to make you feel supported?
✓ Would you like to meet up, maybe for coffee locally, before you come back?
✓ Lots of people find coming back for the first day quite nerve-wracking. Shall I meet you in the car park/ train station/ pick you up on your first day so that we can go in together?

Don’ts

✗ Your clients are desperate for you to get back on track.
✗ Glad you are coming back, we have been so busy covering your work.
✗ You have a lot to catch up on, so I hope you are feeling better.
Step 5: Having a Return to Work conversation

KEY FACTS:

- To make sure the employee returns to work successfully, you will need to have a return to work (RTW) conversation. You will need also to work together to develop a return to work plan, and a plan for reviewing the person’s work and health.
- Managers can tend to focus the RTW conversation around policies and procedures instead of the interaction with this person. This has a negative impact on both the employee and employer.
- Many managers find discussions around employees’ health and RTW difficult. The better prepared you are, the easier it becomes.

WHAT TO DO:

- Make sure you have prepared for the discussion following Step 4 in this guide.
- Use the Return to work conversation guide on the Return to Work website to prepare for, and support you through, this conversation.
- Let the employee know you will be using the conversation guide so that they are prepared and know what questions you will ask them. (This will help them give more constructive answers as well as help to reduce their anxiety about the meeting.)
- Prepare for the return to work conversation (See the checklist in step 4)
- Get yourself into the right mind-set – sensitive, empathic, professional.

WHAT TO DO DURING THE CONVERSATION:

- Take the lead in the return to work conversation.
- Listen and reflect back
- Find ways to make the conversation authentic wherever possible, even though you are following a process set out in the guide.
- Focus on the future, not the past.
- You may need to seek further advice/ agreement from other people before confirming adjustments to the role. Let the employee know what you are doing and when you will get back to them.
- Write up the agreed return to work plan together and agree how you will monitor and review over time.

WHAT NOT TO DO:

- Take formal ‘minutes’: this is not necessary and makes employees feel vulnerable. It looks like you are collecting evidence to manage them out. Have a conversation instead.
- Allow the employee to go back into their old job with all of their old responsibilities and workload straight away. Remember when you come back from holiday, it is hard to catch up. This is similar but probably much harder, because the person may not be feeling 100%.

WHAT TO SAY: See the Return to work conversation guide on the return to work website.
Step 6: Keeping healthy and productive at work

It is important that the employee is supported in the long term. Getting back into work is the first part of a long journey in maintaining their health and continuing to work long into the future.

KEY FACTS:

- Many people who experience mental ill-health only ever experience it once.
- Giving an employee too much work too soon can lead to further absences, or to the employee leaving the company. Imagine if you were fit enough to run 2K but were asked to run 5K. By training over time, you can build up to doing it, but if you do it when you are not ready you are likely to injure yourself. Returning to work is just the same: too much too soon can lead to avoidable problems.
- On-going communication and review of the return plan will give the employee the best possible chance of staying at work and staying healthy.

WHAT TO DO:

- **Monitor and review the work plan:**
  - Do not assume the employee is fully functional. This may take some time.
  - Have regular check-ins, in the way agreed during the return to work conversation
  - Review the work plan at the point agreed during the return to work conversation
  - Make sure that the employee has an alternative point of contact in case they feel unable to raise concerns with their manager (or HR).

- **Agree a wellness programme** as a safety net so that you don’t need to constantly talk about it. Research shows that ‘wellness and recovery action plans, WRAPS’ are effective ways to maintain health and wellbeing and are useful for all of us, not just those experiencing mental ill-health. You could encourage your whole team to write one! (See the wellness recovery action plan on the Mind website).

- **Aim to prevent relapse**
  Some people who take sickness absence due to a mental health problem recover and never experience mental ill-health again. Others find that their mental health fluctuates (or varies) over time, and experience periods of good health and poor health. For those with fluctuating mental health, it may be that the employee takes a second or third period of absence. People often get worse because they take on too much too soon. Effective monitoring by both the employee and employer, and open communication, can help to prevent relapse.

- **Create a healthy workplace**
  The things that help employees to achieve a successful return, also form part of general good practice. For tips on how to create healthy workplaces, see the HSE Management Standards on the Health and Safety Executive website.
What happens if the employee relapses?
If an employee relapses, it is particularly important that any work-related causes of their health problems were addressed when they returned to work after their first spell of absence. If there are work-related causes and these have not been addressed following the employee’s first period of sickness absence, then you, as their employer, are at much greater risk of legal action because the health problems could be seen as ‘foreseeable’.

If the employee has further periods of absence, you can repeat Steps 1-6. It may be that at some point you will need to seek external professional advice and/or re-contract with the employee.

Long term disability
There is always a risk with mental health that the condition becomes long term. Under the Equality Act 2010, in the UK (other than Northern Ireland) a person is disabled if they have a physical or mental impairment that has a ‘substantial’ and ‘long-term’ negative effect on their ability to do normal daily activities. For more information on disability discrimination at work please see the ACAS document on the acas website. The Equality and Human Rights Commission provide various guides on their website, for example on workplace adjustments, disability discrimination and equality law. If you need to make long-term adaptations to an employee’s job, the Government’s ‘Access to work’ scheme might be able to provide a grant.

What to do when things don’t go to plan
Unfortunately, despite best efforts an employee may not be able to return to work and resume their duties. In these instances, there are a number of things you can consider including ill-health retirement or exiting the employee. When this is the case, you may wish to seek professional advice.
Where to go for further information:

1. **To find out more about mental health:**
   - Mind- [https://www.mind.org.uk/](https://www.mind.org.uk/)
   - Mental Health Foundation- [https://www.mentalhealth.org.uk/](https://www.mentalhealth.org.uk/)

2. **Advice on talking about mental health:**
   - Time to talk- [https://take-time-to-talk.com/](https://take-time-to-talk.com/)
   - Encouraging a conversation about mental health at work- [https://www.time-to-change.org.uk/sites/default/files/2.%20Tool_Starting_the_Conversation.pdf](https://www.time-to-change.org.uk/sites/default/files/2.%20Tool_Starting_the_Conversation.pdf)

3. **Where to find support and access treatment:**
   - NHS- [http://www.nhs.uk/livewell/mentalhealth/Pages/Mentalhealthhome.aspx](http://www.nhs.uk/livewell/mentalhealth/Pages/Mentalhealthhome.aspx)

4. **Professional advice and support:**
   - CIPD (Chartered Institute of Personnel and Development)- [https://www.cipd.co.uk/](https://www.cipd.co.uk/)
   - IOSH (Institution of Occupational Safety and Health)- [https://www.iOSH.co.uk/](https://www.iOSH.co.uk/)

5. **Managing mental health at work:**
   - Fit for Work- [http://fitforwork.org/employer/](http://fitforwork.org/employer/)
   - Access to Work- [https://www.gov.uk/access-to-work/overview](https://www.gov.uk/access-to-work/overview)
### Information on stress, anxiety and depression

<table>
<thead>
<tr>
<th>Common mental health problem</th>
<th>Common signs and symptoms</th>
<th>Possible impact on work</th>
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</table>
| **Stress** is the reaction people have when they are unable to cope with excessive pressures or other types of demand placed on them. | **Physical** - panic attacks, tiredness, headaches, chest pains, problems sleeping/too much sleep, feeling sick/dizzy, constipation/diarrhoea, grinding your teeth/clenching jaw, shallow breathing or hyperventilating.  
**Behaviour** - lack of concentration, feeling tearful/crying, restless, increased smoking/drinking alcohol, difficulty in making decisions, biting your nails/picking your skin, snapping at people.  
**Feelings** - anxious, nervous, racing thoughts, irritable/impatient, depressed, lonely, having a sense of dread, uninterested in life/not motivated. | • Unable to concentrate  
• Difficulty in making decisions  
• Avoiding troubling situations  
• Agitated by colleagues  
• Uninterested in work  
• Tired at work  
• Withdrawing from colleagues at work |
| **Anxiety** is a feeling of unease, worry or fear. While we are all anxious at some point, someone with anxiety is overwhelmed by these feelings. | **Physical** - nausea, faster breathing, sweating, difficulty sleeping, churning stomach, feeling light headed or dizzy, fast/thumping heart beat  
**Psychological** - feeling tense/nervous, feeling your mind is full of thoughts, feeling restless and unable to concentrate, dwelling on negative experiences. | • Showing signs of tenseness and nervousness  
• Focusing on negative aspects  
• Overthinking/unable to stop racing thoughts which affects concentration |
| **Depression** is a feeling of persistent sadness and low mood. | **Feelings** - upset/tearful, hopelessness, restless/irritable, isolated and unable to talk to others, feeling down, no confidence.  
**Behaviour** - avoid social events that you would usually enjoy, weight loss/gain, loss of appetite/eating too much, difficulty sleeping/sleeping too much, substance abuse/increased alcohol consumption, lack of concentration, unable to face the day | • Late for work  
• Not able to concentrate  
• More emotional at work  
• Not able to cope with workload  
• Taking time off work  
• Not able to communicate any feelings about how you feel |
Interactive materials for Step 1:

TEMPLATE LETTER/EMAIL: Example email to edit and use to send to an employee when they have not notified you of their absence

[Date]
Dear [employee’s name],

I am writing to see how you are as you have not been at work for the last week/ x days...

While your health is our main concern, if you are absent for more than 7 days, we do also need to ask you to obtain a **Fit note** from your doctor. We need this in order to process your [Statutory] Sick Pay.

We would like to agree how to communicate with you whilst you are on sick leave. It is important that you have the space that you need to get better, but it is also important for us to know how you are getting on so that we can help you when the time is right. Please tell us what your communication preference would be (you may prefer a telephone, email or meet ups), by whom (line manager/designated colleague) and the frequency/time (e.g. once a week, after your GP appointment).

We hope to hear from you soon as we are concerned about you.

Yours sincerely,

[Your name and signature]
CHECKLIST: Example telephone conversation checklist to talk to an employee when they have not notified you of their absence

- **Start off as you would with any conversation**: exchanging pleasantries and having an informal catch up.

- **State why you are calling**: ‘I wanted to talk to you about your health as you have not been at work for x number days’.

- **Explain that after 7 days of absence they will need a Fit note**: We need this in order to process your [Statutory] Sick Pay.

- **Agree how to communicate** with them whilst they are on sick leave. Talk about what their communication preference would be (they may prefer telephone, email or meet ups), by whom (line manager/designated colleague/Human Resources) and the frequency/time (e.g. once a week, after your GP appointment).

- **Recognise that they need this time to get better but that it is also important to maintain communication and to know how they are getting on** so that you can help support them back to work when the time is right.

- **Confidentiality**: Ask them whether they would like their reason for absence to be kept confidential to all colleagues/clients or whether they would like their immediate team to be told.

- **Questions**: Ask if they have any questions or anything they need clarifying, for example sickness pay, whether they should communicate directly with HR etc.

- **Closing the conversation**: Thank them for talking about their mental ill health and let them know that you are there to help support them during this time.
Interactive materials for Step 2:

EXERCISE: Tips and tools for having an open conversation

Here are some important points to help prepare for a sensitive conversation. For more ideas including how to close the conversation see the Managing conversations pdf on the Time to Change website:

- **Find somewhere suitable to talk**: If it’s an informal meetup then maybe a quiet café or somewhere away from the office. Otherwise find somewhere quiet and private.
- **Give them your full attention**: Let them do the talking. Avoid interrupting. Leave questions and comments for when they have finished talking.
- **Don’t be judgemental**: The employee will be very aware of the stigma that is attached to mental health. They may be worried about being seen as weak or vulnerable. Be understanding about what they are telling you, without passing judgement.
- **Check that you’re on the same page**: Try paraphrasing what the employee has told you to check that you completely understand what has been said. Also reflect what they are saying to you e.g. ‘I find it hard to cope’, use the word ‘cope’ in your conversation.
- **Be encouraging and use positive language**: This will make the employee feel more at ease and help them to open up. To show you are actively listening, small comments like ‘what happened next’ and ‘I see’ will help.
- **Remember to be empathetic**: This conversation might be terrifying for the employee, so remember to show empathy towards them e.g. ‘I know this must be really difficult for you’.
- **Don’t ask too many questions**: And when you do ask questions, ask open questions rather than questions that can be answered simply using ‘yes’ or ‘no’.
- **Avoid clichés and insensitivity**: Saying things like ‘You’re just having a bad day’ or ‘pull yourself together’ are not encouraging or helpful.
- **Ensure confidentiality**: Discuss who will have access to the details of your conversation and remember not to share this information with anyone else.

Where to go for further information:

- For more general help on challenging conversations and how to manage them download the pdf on the acas website.
EXERCISE: Putting yourself in your employee’s shoes and thinking about how you communicate with an employee with mental health problems

When dealing with employees who suffer from mental ill health, it is often difficult to know what to say. Sometimes our own stress – for example, due to the pressure of having to deal with an increased workload/reduced team or manage sickness absence – gets in the way of our being able to manage the person in as calm a way as we would like.

This exercise will help you, as a manager, understand and communicate with a member of your team who has mental ill health and been off work on sickness absence. Take 5 minutes to do it as part of preparing for a conversation with them.

1. Bring the employee with mental health problems clearly to mind. Notice if you have any feelings of irritation, frustration, worry or other negative feelings. Acknowledge these feelings, without judging them or dwelling on them. Also bring to mind any positive feelings you have about this person, perhaps appreciation, kindness and compassion.

2. Write down 5 conceivable reasons for this person’s mental ill health. If they are off sick at the moment, also write down 5 possible reasons for this current spell of sickness absence.

3. How would you think and feel at work if those reasons applied to you/if you had that history?

4. How could you connect with and support someone who may act for those potential reasons? Note down your thoughts on this to help guide you when you go into a conversation with the person concerned. For more on dealing with other people’s negative emotions see the Managing Mental Health Matters website.
EXERCISE: Consider the 5 ways to wellbeing (For more details see the Mind website).

<table>
<thead>
<tr>
<th>The five ways to wellbeing</th>
<th>Do I do enough of this this?</th>
<th>Action to improve my wellbeing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connect with others</td>
<td></td>
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<tr>
<td>For example, arrange to meet a friend for lunch or a walk, visit neighbours.</td>
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<tr>
<td>Be active</td>
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<tr>
<td>For example, walk, cycle, run, go to the gym, take up yoga. Find an activity that you enjoy.</td>
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<tr>
<td>Take notice</td>
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<tr>
<td>For example, reflect on what is going on around you. Some useful resources include NHS Help page, HEADSPACE, BE MINDFUL, MIND or try the gratitude exercise in this guide: click here. Alternatively, you can try a mindful/reflective diary.</td>
<td></td>
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<tr>
<td>Learn</td>
<td></td>
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<tr>
<td>Learning new things helps us build self-esteem. For example, sign up for a course, learn a new skill from a friend, read a book.</td>
<td></td>
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<tr>
<td>Give</td>
<td></td>
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<tr>
<td>Giving back to others makes us feel good. For example, volunteer in your community, help others with shopping/tasks, do something nice for a stranger.</td>
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</tbody>
</table>
CHECKLIST: Other important things you can do to improve your mental health

Are you:

- Eating properly? [See the Food and Mood page on the Mind website](https://returntoworkmh.co.uk/).
- Sleeping properly?
- **Doing what makes you feel happy?** Make a list of three things you used to do that made you feel good before you became ill. Can you go out and do them? Maybe ask a friend to come and support you.
- **Doing things you are good at?** What is it that you are good at? Make a list of three things you are good at, things that you enjoy and know that you can do well. Make a plan for how you do more of these.
- **Aware of what you need to improve and protect your mental health?** Consider putting in place a Wellness and Recovery Action Plan ([WRAP website](https://returntoworkmh.co.uk/)).
- Think about what you think went well today. Also write down what didn’t go so well today and what could be done differently tomorrow. This diary aims to get you to think about things that have been positive as well as challenging. It also aims to help you think about how you can improve in the future.
- Print it off and complete it for the week. Keep it somewhere that you have easy access to. It can be completed at the end of each day.
**Template Email:** Example email to edit and send to the employee to request the fit note and information from GP.

```
Dear [Employee’s name],

I am sorry that you are unwell and not able to come to work. During your time off, please take care of yourself and let us know if you need anything. The team are thinking of you and we hope you get better soon.

As you have been absent for < more than seven days>, we would like to understand a bit more about your health condition and its potential impact on your work. You are a valued member of our team and we want to support you in your recovery and your return to work.

We would like permission to contact your GP. In order to do this, we need you to complete the following consent form. The consent form will allow us (as your employer) to access your medical records through your GP. The Access to Medical Reports Act 1988 allows an individual the right to withhold consent for an employer to access medical records. It also allows the right for individuals to see the medical report before it is sent to the employer by the GP (for more details on this legislation click here). However, without your consent it will be difficult for us to fully support you while you are on sickness absence and when you return to work. If you would like to talk to someone before completing the form, please contact [add name and contact details].

Any information from your GP, and other medical reports will be kept confidential and only made available to [insert who has access to the confidential report e.g. Line manager/HR professional/Occupational health].

If you are happy to, please complete this consent form below and return to [insert contact details e.g. name and address].

I have been informed of my statutory rights under the Access to Medical Reports Act 1988 and hereby consent to my employer requesting a report giving medical information regarding my current ill health and medical history from a doctor who has been responsible for my physical or mental health care. I understand that this consent form will be copied to that doctor and shall have the validity of the original.

I do/do not wish* to see the report before it is sent to my employer. *Delete as appropriate.

I give my employer, [insert name] permission to contact you to discuss my condition and return to work plan.

Your Name: [Employee’s name here]
D.O.B.: [Employee’s DOB]
Address: [Employee’s address]
Doctors Name: [Doctor’s name here]
Doctors contact details: [Doctor’s telephone number]
Address of Doctors Surgery: [Doctor’s surgery address]

[Employee’s and signature]
[Date]

-----------------------------------------------------------------------------------------------------------------------------

With thanks for your help on this
[insert usual sign-off and name]
```
Dear Dr. [insert name of Doctor],

Re: Requesting medical report for [employee’s name].

I am writing to you as [employee’s name] has been on sickness absence since [start date of sickness absence] due to [details from medical certificate/Fit Note]. It is worth mentioning that in the last 12 months [employee’s name] has been off [number of sickness absence days] days due to this condition. As [employee’s name] is a valued member of our team, we would like to know how best to support them during their absence and when they return to work. Their position here involves [describe their job tasks/work activities, give an overview of their working context e.g. team environment, office based etc.].

**Information request**

As you are [employee’s name]’s GP, I would like to request some further information from you. I need to understand when you believe they will be returning to work and whether there is likely to be a relapse/on-going mental health trigger that we can avoid in the future. [Here you should include questions that you think are relevant and helpful to support the employee and plan for their return to work. There are some example questions below].

- Do you think they will be able to return to work? If so when by (knowing this will help us arrange cover and plan for their return to work)?
- ‘Are there side-effects from any medication that we need to be aware of in relation to their job?’ ‘Is there a likelihood of relapse and if so what can we do to help prevent this?’
- ‘Are there any adjustments we might consider in order to enable them to continue working in this role? [Gradual/phased return/lighter duties]

I have also included the consent form from [employee’s name] which allows the disclosure of their medical information.

I understand there is a fee for this service, please contact [appointed contact at the company] who will be happy to settle the fee once it has been agreed with [company name].

I look forward to hearing from you.

Yours sincerely,

[Name of writer, job title, company name]

[Signature] [Date]
Interactive materials for Step 4:

EXERCISE: Identifying work priorities

Sometimes employees spend a lot of time worrying about something that managers do not see as important. Before you meet with the employee, write down some of the most important aspects of the job and rank these. You can then use this list of priorities to explore overlap and differences between your list and the employee’s list to agree priorities for the initial return period.

Tasks

- Red – top priority tasks (within xx days):
- Amber – need to be done (but not urgent, within x week/s):
- Green – can wait (over the next few weeks):

EXERCISE: Reviewing example adjustments to help formulate ideas

Think about other adjustments that might be appropriate. See Workplace Strategies for Mental Health website for more suggestions and for specific strategies aimed at small business owners. For reasonable adjustments for a disability (Equality Act 2010/Disability Discrimination Act) see Equality and Human Rights Commission website.

- Out of office email to alleviate pressure of responding to emails
- Prioritise tasks or categorise them into important vs not important (as in the exercise above). Agree this with the employee and review daily/weekly.
- Adjust working hours so they don’t have to travel in peak times, and can avoid crowded trains and traffic jams
- Reduce contact with customers/public – e.g. divert phone for an initial period
- Consider deadlines and workload planning to avoid peaks of pressure
- Allow some working from home if that is supportive
- Allow time off for medical appointments and/or psychological support
- Offer re-training or refresher training to the employee
- Suggest that the employee identifies how their mood fluctuates depending on the time of day and tasks they do. Use this to help you both to allocate tasks so that more challenging tasks are done when they are feeling strong and you both understand which tasks affect them most.
- Provide a gradual return to work whereby the employee works 2 days a week for the first week, three for the second etc.
- Consider Keep in Touch days where by the employee can come in while they are on sick leave to keep up to date with what is going on in the office.
CHECKLIST: Planning for the employee’s return to work

- Give them a proper handover when they return: update them on any changes, e.g. new staff, different processes. This will help them to settle back in.
- Who knows about their mental ill-health? From previous discussion you will know how the employee wanted you to communicate their mental ill health/sickness absence to colleagues. Remind them of who has been told and which colleagues are unaware.
- Involve them in informal rituals at work, e.g. tea round, lunch plans.
- Introduce a ‘Buddy system’: this could be a close colleague who they are friends with. Having a buddy will help them to integrate back into the team and allows them to have a designated person that they can ask questions.
- Promote team spirit and encourage colleagues to welcome the employee back so that they will valued and comfortable.
- If possible, encourage a phased return to work i.e. not full-time and full workload on day one.

CHECKLIST: Preparing for the return to work conversation

- Agree a time to meet with the returning employee and ask them to prepare for the conversation using the conversation guide.
- Make sure you have somewhere quiet and private to meet, where the employee can talk confidentially. Sitting next to each other, informally, rather than across the desk from each other.
- Agree with the employee if it will be just you and the employee, or whether a third person will also be there e.g. a trusted colleague, HR or OH professional.
- Review any communication you have had with the employee since the absence, so you are fully informed.
- Take into account any advice from the employee’s GP, or health professional (e.g. Occupational health, rehabilitation specialist).
- Take into account any work-related issues that occurred prior to the absence if you know the absence is work-related.
- Consider what the organisation needs, your needs as manager, and your team’s needs (see the exercises in Step 4).
- Get yourself in the right mind-set – sensitive, professional, empathetic.