**Phased Return to Work Plan Agreement**

**AN INTRODUCTION**

The main purpose of a ‘***Phased Return to Work Agreement Plan***’ (PRTWP) is to help enable the staff member and their line manager agree how and when to facilitate a ‘*Phased Return to Work Plan’* following a long period of absence from work.

It is designed to complement the employer’s Attendance or Sickness Management Policies, an Individual Stress Risk Assessment (ISRA) form and any advice recommended from an Occupational Health Assessment (OHA).

For the plan to work effectively it should be: -

* Jointly owned by both the staff member who has been absent from work and their line manager, the plan should be agreed between both before the staff member’s planned return date.
* Transparent in terms of performance objective expectations between both the individual and their line manager. Objectives should be **S.M.A.R.T.** reviewed regularly and agreed. www.mindtools.co.uk - SMART Goals
* Completed over a period of time, ideally four to six weeks and remain flexible, taking into account both individual and workplace needs.
* Reviewed regularly, ideally weekly at ‘***Progress Meetings’*** or *‘One to Ones’* between the staff member and their line manager - checking in on the staff members wellbeing and performance, ensuring progress remains satisfactory for both parties.

**Progress Meetings**

## The purpose of these meetings is to set aside dedicated time to have an open and honest qualitative conversation about: -

1. The staff member’s general coping strategy(s) and wellbeing. Could flexible working be considered i.e working from home?
2. Identifying /acknowledging any changes or obstacle that may prevent the plan progressing successfully. To discuss and agree solutions.
3. Ensure all objective(s) are agreed and remain **S.M.A.R.T**. (www.mindtools.com)
4. How the return-to-work plan is progressing in general, along with the agreed working pattern.
5. Recognise achievement areas, next steps, and review dates.

## **Ongoing Wellbeing Support**

In the event of any difficulties, concerns, or life changes outside of the staff members control the plan should be adjusted accordingly. The employers Occupational Health providers, internal wellbeing support services, HR department, Trade Union facilities (if recognised) and medical professionals should be utilised and consulted for extra support and guidance. External wellbeing resources should also be considered such as www.italk.org.uk and Solent Mind, Hampshire's leading mental health charity.

**Phased Return to Work Plan Agreement**

**EXAMPLE ONLY**

**EXAMPLE ONLY**

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **Staff Member:** Joe Bloggs **Start Date of Plan:** Mon 8th Jan 2024 | | | | | | | |
| **Line Manager:** Claire Smith | | | | | | | |
| **WEEK ‘*ZERO’*** – **Things that needs to be completed prior to the 1st Day of the Plan (i.e required learning)** | | | | | | | |
| 1. Review the employers Ill Health or Wellbeing Policy and Procedures (may also be called Attendance or Sick Absence policies) 2. Complete an OHA (Occupational Health Assessment) and discuss the outcome report/recommendations with line manager. 3. Complete and share with line manager a ‘***Wellness Action Plan’*** or ‘***Individual Stress Risk Assessment’*** form. 4. Secure in diary with line manager a one-to-one progress meetings for the duration of the PRTWP. | | | | | | | |
| **WEEK ONE** – **Monday 8th Jan 2024** | | | | | | | |
| **Objectives to be achieved this week** | 1. To catch up on required training 2. To catch up on meeting minutes /noteswhilst been away from work.   **EXAMPLE ONLY**   1. To catch up on emails and general administration | | | | | | |
|  | **Start AM** | **Finish AM** | **Break** | **Start PM** | **Finish PM** | **Hrs** | **Comments from the day** |
| **Monday:** | 8:00 am | 11:00 noon | **-** | 0:00 pm | 0:00pm | 3 | Felt really nervous on my first da, but it turned out ok in the end. |
| **Tuesday:** | 8:00 am | 11:00 noon | **-** | 0:00 pm | 0:00pm | 3 | Felt really tired when got home, but ok. |
| **Wednesday:** | 8:00 am | 12:00 noon | **1 hr** | 1:00 pm | 2:00pm | 5 | Its beginning to feel more comfortable. |
| **Thursday:** | 8:00 am | 12:00 noon | **1 hr** | 1:00 pm | 2:00pm | 5 | Had a bit of a wobble today but managed it ok. |
| **Friday:** | 8:00 am | 12:00 noon | **1hr** | 1:00 pm | 3:00pm | 6 | Really pleased with myself for getting this far and completing this stage. |
| **Total Hours Worked PW:** | 22hrs | 60% (of 37.5 contractual hrs) | **Comments from the week.** Was nervous at first, but it all turned out ok. Grateful of my line manager’s continued support. Look forward to next week. **Next Progress Meeting**: Fri 12th Jan - 2:00pm | | | | |

**Phased Return To Work Plan Agreement**

**For**

**­­­­­­­­­­­­­­­STAFF MEMBER:**

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| **WEEK ‘*ZERO’*** – **Things that needs to be completed prior to the 1st Day of the Plan (i.e required learning)** | | | | | | | |
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| **WEEK ONE DATE:** | | | | | | | |
| **Objectives to be achieved this week** |  | | | | | | |
|  | **Start AM** | **Finish AM** | **Break** | **Start PM** | **Finish PM** | **Hrs** | **Comments from the day** |
| **Monday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Tuesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Wednesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Thursday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Friday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Total Hours Worked PW:** | 00 hrs | 0%  (of contractual hrs) | **Comments from the week.**  **Next Progress Meeting**: | | | | |

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| **WEEK TWO** **DATE:** | | | | | | | |
| **Objectives to be achieved this week** |  | | | | | | |
|  | **Start AM** | **Finish AM** | **Break** | **Start PM** | **Finish PM** | **Hrs** | **Comments from the day** |
| **Monday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Tuesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Wednesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Thursday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Friday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Total Hours Worked PW:** | 00 hrs | 0%  (of contractual hrs) | **Comments from the week.**  **Next Progress Meeting**: | | | | |

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| **WEEK THREE** **DATE:** | | | | | | | |
| **Objectives to be achieved this week** |  | | | | | | |
|  | **Start AM** | **Finish AM** | **Break** | **Start PM** | **Finish PM** | **Hrs** | **Comments from the day** |
| **Monday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Tuesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Wednesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Thursday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Friday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Total Hours Worked PW:** | 00 hrs | 0%  (of contractual hrs) | **Comments from the week.**  **Next Progress Meeting**: | | | | |

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| **WEEK FOUR** **DATE:** | | | | | | | |
| **Objectives to be achieved this week** |  | | | | | | |
|  | **Start AM** | **Finish AM** | **Break** | **Start PM** | **Finish PM** | **Hrs** | **Comments from the day** |
| **Monday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Tuesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Wednesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Thursday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Friday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Total Hours Worked PW:** | 00 hrs | 0%  (of contractual hrs) | **Comments from the week.**  **Next Progress Meeting**: | | | | |

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| **WEEK FIVE** **DATE:** | | | | | | | |
| **Objectives to be achieved this week** |  | | | | | | |
|  | **Start AM** | **Finish AM** | **Break** | **Start PM** | **Finish PM** | **Hrs** | **Comments from the day** |
| **Monday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Tuesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Wednesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Thursday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Friday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Total Hours Worked PW:** | 00 hrs | 0%  (of contractual hrs) | **Comments from the week.**  **Next Progress Meeting**: | | | | |

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| **WEEK SIX** **DATE:** | | | | | | | |
| **Objectives to be achieved this week** |  | | | | | | |
|  | **Start AM** | **Finish AM** | **Break** | **Start PM** | **Finish PM** | **Hrs** | **Comments from the day** |
| **Monday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Tuesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Wednesday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Thursday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Friday:** | 00:00 am | 00:00 | **-** | 0:00 pm | 0:00pm | 00 |  |
| **Total Hours Worked PW:** | 00 hrs | 0%  (of contractual hrs) | **Comments from the week.**  **Next Progress Meeting**: | | | | |

## **COMMENTS:**

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## **PLAN AGREEMENT BETWEEN:**

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| **STAFF MEMBER:** |  | **DATE:** |

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| **LINE MANAGER:** |  | **DATE:** |

## **REVIEW OF PLAN AGREEMENT**

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| Date of Review | Changes made to the above plan | Reason for Changes | Staff Member Initial | Line Manager Initial | Date of Next Review |
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