

PROBATION BOARD FOR NORTHERN IRELAND

Managing Attendance

Policy and Procedure

September 2026

Document control

Policy Identification	
Policy Ownership	
Department:	Human Resources (HR)
Owner:	Human Resources (HR)
Author:	Head of HR and OD
Screening and Proofing	
Section 75 Screened:	February 2025
Human Rights Screened:	February 2025
Data Protection Screening	March 2026
Trauma Informed Screening	May 2025 AI Screening undertaken October 2025
Consultation	
SLT NAPO NIPSA	Policy Review Process 2024/2025 included representatives from trade unions during 2025 and with all staff 10 November 2025 to 22 December 2025 Trade Unions up to 22 May 2026
Approval	
Senior Leadership Team (SLT)	14 October 2025 8 September 2026
Corporate Resources Committee (CRC)	10 September 2026
Board	17 September 2026
Version	
Version:	0.9/Revision Number 1

Date of Issue:	17 September 2026
Implementation date:	17 September 2026
Review date:	17 September 2030

Version history

Version	Date	Description
0.1	6 March 2017	First draft
0.2	9 March 2017	Further amendments
0.3	28 April 2017	Amendments following feedback
0.4	1 February 2018	Review points revised
0.5	September 2018	Amendment following Department of Justice feedback
0.6	2026	Policy review draft
0.7	August 2026	Revised following consultation
0.8	August 2026	Coherent revised draft: terminology, structure, safeguards and process clarified
0.9	September 2026	Final Copy saved into Content Manager and the intranet/internet.

Alternative formats

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Contents

Managing Attendance Policy	5
1. Purpose and aims	5
2. Scope	5
3. Core principles	6
4. Definitions.....	7
5. Trauma-informed and equality-informed practice.....	8
6. Roles and responsibilities	9
7. Right to be accompanied	11
8. Records, confidentiality and monitoring.....	11
9. Occupational and statutory sick pay	12
10. Linked policies and guidance.....	15
Managing Attendance Procedure	16
Procedure Applying to Every Sickness Absence	16
11. Notification and initial action	16
12. Certification Requirements.....	19
13. Maintaining Contact During Sickness Absence	22
14. Occupational Health and Workplace Support.....	26
15. Return to Work	32
16. Management of Long-Term Sickness Absence.....	36
17. Attendance Review Process	42
18. Appeals	50
19. Employees in Their First Year of Employment	55
20 Wellbeing.....	59
21. Sickness Absence: Annual Leave, Flexi Leave and Time Off in Lieu	60
22. Time Off for Medical, Dental and Optician Appointments	64
23. Reporting of Accidents, Injuries, Diseases and Dangerous Occurrences	67

Managing Attendance Policy

1. Purpose and aims

1.1 The Probation Board for Northern Ireland (PBNI) recognises the benefits of having a healthy and committed workforce whilst at the same time having a robust, clearly understood procedure for managing sick absence. It is recognised that a certain level of absence due to ill health may occur. It is also recognised that there will be occasions where, after consideration, individuals cannot attend work due to ongoing health problems and may not be able to continue working. The PBNI is committed to supporting staff wherever possible under these circumstances.

1.2 The purpose of this policy is to provide a consistent, supportive and evidence-based framework for maintaining attendance, helping employees remain in or return to work safely, and addressing attendance that has become unsatisfactory or unsustainable. The responsibilities placed on PBNI by the Disability Discrimination Act 1995 (DDA) and the employment order (NI) 1996 which will be observed at all times, including the requirement to consider and where reasonable, make workplace adjustments for employees with a disability. PBNI has introduced a Disability (Workplace Adjustment) Passport and Guidance to support a best practice approach to meeting our legal obligations to consider reasonable adjustments for staff who have a disability or a health condition that may be considered a disability.

1.3 The policy aims to balance the employee's health, dignity and individual circumstances with PBNI's duty to deliver effective services, manage resources and provide a safe workplace.

1.4 The policy must be applied proactively, consistently, fairly, proportionately and in a trauma-informed manner. It is not a disciplinary procedure. Where there is evidence of misconduct, that matter may be considered separately under the appropriate PBNI policy after HR advice.

2. Scope

2.1 This policy applies to all PBNI employees. Section 19 contains additional provisions for employees in their first year of employment.

2.2 The policy covers sickness absence, attendance concerns related to ill health, return-to-work support, occupational health advice, reasonable adjustments, and capability decisions arising from ill health or attendance.

2.3 Pregnancy-related sickness absence will be recorded but excluded from short-term review points and Attendance Notices during the protected period. Disability-related absence will be considered individually, including whether review points or other arrangements should be adjusted as a reasonable adjustment.

3. Core principles

PBNI's Managing Attendance policy is based on the following principles:

3.1 PBNI recognises that work generally supports good physical and mental health and wellbeing.

3.2 PBNI is committed to reducing sickness absence and minimising its impact on service delivery and colleagues.

3.3 Employees are expected to take responsibility for maintaining good attendance.

3.4 Attendance will be managed fairly, consistently, transparently, and with support and compassion.

3.5 Managers have a duty to take reasonable steps to protect employee health and wellbeing and reduce the risk of ill health where possible.

3.6 Where absence levels are unsatisfactory, managers will take appropriate action to reduce the frequency or duration of sickness absence.

3.7 All reported sickness absences will be treated as genuine unless evidence gives PBNI a reasonable basis to suggest otherwise.

3.8 PBNI may invoke other relevant policies, including the Disciplinary Policy and Procedure, where explanations for absence are not provided, are considered unsatisfactory, or where misuse of the system is identified.

3.9 Occupational Health Services will be used where appropriate.

3.10 Employees unable to attend work due to sickness may be entitled to Occupational Sick Pay and/or Statutory Sick Pay, subject to meeting the relevant conditions.

3.11 PBNI reserves the right to withhold Occupational Sick Pay where an employee fails to cooperate with reasonable requests or enquiries relating to their medical condition.

3.12 PBNI is committed to maintaining high standards of service delivery.

3.13 The confidentiality of all information relating to an employee's sickness absence will be respected.

3.14 PBNI will fulfil its responsibilities under the Disability Discrimination Act (DDA).

3.15 Employees subject to formal procedures under the Managing Attendance Procedure have the right to seek support from a trade union representative (see Section 9).

4. Definitions

Term	Definition
Sickness absence	An authorised absence because an employee is unable to work owing to illness, injury or another health-related incapacity, supported by the required notification and evidence.
Short-term absence	One or more separate spells of sickness absence, normally of relatively short duration, assessed against the review points in section 13.
Long-term absence	Continuous sickness absence lasting, or expected to last, four calendar weeks or more.
Unsatisfactory attendance	A short-term attendance pattern that reaches a review point and, after individual consideration, requires supportive or formal action. Further detail is set out in section 17
Unsustainable attendance	Attendance that, after appropriate support, advice and adjustment consideration, PBNI reasonably concludes cannot be sustained because regular and effective attendance is not reasonably foreseeable or continued absence can no longer reasonably be accommodated. Further detail is set out in section 17
Review point	A numerical indicator requiring review. It is not an automatic warning or finding.

Term	Definition
Attendance Notice	A formal written outcome of the absence review process either a First Attendance Notice or Final Attendance Notice.
Managing Attendance Meeting	A formal meeting under the managing attendance procedures, after a review point is reached.
Absence Review Meeting	A formal supportive review under the long-term absence route.
Working day	A day on which the employee is rostered or contracted to work, unless a section expressly states otherwise.
Calendar day	Every day, including weekends and public holidays.
Fit Note	A Statement of Fitness for Work issued by an authorised healthcare professional.
OH	PBNI's Occupational Health service, which provides independent occupational-health advice to PBNI and the employee.

5. Trauma-informed and equality-informed practice

5.1 Managers will seek to promote safety, trustworthiness, choice, collaboration, empowerment and inclusion. This includes explaining processes in plain language, agreeing suitable contact arrangements, avoiding unnecessary repetition of sensitive information, allowing breaks, and considering the impact of meetings, location and communication methods.

5.2 Trauma-informed practice does not prevent PBNI from making necessary attendance or capability decisions. It affects how information is obtained, how support is offered and how decisions are communicated.

5.3 Managers must consider whether the employee may be disabled for the purposes of Northern Ireland disability discrimination law, without requiring the employee to use a particular label. HR advice and OH input should be sought where appropriate. Agreed adjustments can be recorded in the Disability (Workplace Adjustment) Passport or other approved written adjustment record.

6. Roles and responsibilities

6.1 Employees are responsible for:

- Maintaining regular attendance at work and understanding the standards and requirements of this Policy.
- Informing their manager at the earliest opportunity of any health issue that may affect attendance or performance.
- Following absence reporting procedures and maintaining regular contact with their manager throughout any period of absence.
- Providing Fit Notes within the timescales specified in the Managing Attendance Procedure.
- Participating in return-to-work interviews following any sickness absence.
- Conducting themselves in a manner that supports recovery and wellbeing.
- Avoiding activities that may be inconsistent with the reason for absence or could hinder recovery, including:
 - Participating in activities that may aggravate an illness or injury or delay recovery.
 - Taking holidays contrary to medical advice.
- Complying with the Extra Mural Activity arrangements where undertaking other employment or voluntary work.

This list is not exhaustive.

6.2 Responsibilities of Managers

Managers are responsible for:

- Managing attendance effectively within their area of responsibility and monitoring absence levels to identify and address concerns.
- Ensuring employees understand this Policy and the absence reporting procedures.
- Promoting early intervention and supporting employees whose health may affect attendance or performance.
- Ensuring absence reporting procedures are followed.
- Maintaining appropriate contact with employees during periods of absence and monitoring progress and likely return dates.
- Supporting employees to remain in work or return to work as soon as reasonably practicable.
- Conducting return-to-work interviews, absence review meetings, and managing attendance meetings in accordance with the Procedure.
- Seeking advice and support from HR where appropriate.
- Maintaining accurate absence records and providing timely information to HR.
- Initiating Occupational Health referrals, in consultation with HR, where appropriate.
- Fulfilling their responsibilities for the effective management of staff resources and associated costs.

6.3 Responsibilities of Human Resources (HR)

HR is responsible for:

- Providing advice, guidance, and support to managers and employees on the management of sickness absence.
- Promoting the fair, compassionate, and consistent application of the Managing Attendance Policy and Procedure.
- Collecting, analysing, monitoring, and reporting absence data and trends, as appropriate.

6.4 Responsibilities of Employee Representatives

Employee representatives are responsible for:

- Providing advice, guidance, and support to employees on matters relating to sickness absence and attendance management.

7. Right to be accompanied

7.1 An employee may be accompanied at any formal Absence Review Meeting, Managing Attendance Meeting, dismissal consideration meeting or appeal by a trade-union representative or PBNI work colleague of their choosing. By agreement, an additional support person may attend as a reasonable adjustment or other appropriate support, but does not normally act as the representative.

7.2 The representative or companion may address the meeting, present and sum up the employee's case, respond to views expressed and confer privately with the employee. They may not answer factual questions instead of the employee where the employee is able and willing to answer, or prevent others from contributing.

7.3 The employee should notify the meeting chair of their chosen companion. If that person cannot attend, the employee may propose a reasonable alternative date within five working days after the original date. Any further postponement will be decided by the chair with HR, considering health, fairness, representation and operational needs. Reasons will be recorded.

8. Records, confidentiality and monitoring

8.1 Managers must record only information necessary for attendance management. Fit Notes and medical reports must be sent securely to HR and must not be stored in general team files.

8.2 Meeting invitations, records, outcome letters, adjustment records and supporting documents will be retained on the appropriate HR file in accordance with PBNI's retention schedule. The employee will receive a copy of formal meeting records and outcomes.

8.3 PBNI may analyse anonymised or appropriately restricted attendance information to monitor organisational trends, consistency and equality impacts.

9. Occupational and statutory sick pay

9.1 Eligibility and payment are governed by the employee's contractual terms, the PBNi Occupational Sick Pay Scheme and statutory requirements. HR will provide an individual entitlement calculation on request.

Completed service at first day of absence	Maximum occupational sick pay
During first year	One month full pay and, after four months' service, two months half pay
During second year	Two months full pay and two months half pay
During third year	Four months full pay and four months half pay
During fourth and fifth years	Five months full pay and five months half pay
After five years	Six months full pay and six months half pay

9.2 For scheme calculation purposes, one month is 26 working days, with Saturday counted as a working day where required by the scheme. HR will calculate entitlement by reference to the applicable scheme and the employee's absence record.

9.3 Occupational Sick Pay (OSP) and Statutory Sick Pay (SSP)

Employees who are unable to attend work due to sickness may be entitled to Statutory Sick Pay (SSP), subject to the relevant statutory requirements. In addition, PBNi provides Occupational Sick Pay (OSP) in accordance with the terms of this Policy.

OSP will normally be paid upon receipt of the required self-certification or Fit Note. Combined OSP and SSP payments will not exceed an employee's normal pay. Where necessary, the OSP element will be adjusted to ensure this limit is not exceeded.

OSP entitlement is calculated from the first day of sickness absence. Employees can obtain information on their OSP and SSP entitlement by contacting Human Resources.

The periods of full and half pay available under the OSP scheme represent maximum entitlements only. PBNi reserves the right to consider alternative outcomes, including termination of employment on capability grounds or medical retirement, before maximum sick pay entitlements have been exhausted, having considered all relevant circumstances and advice.

9.4 Disability-Related Sickness Absence

Where an employee is absent due to a disability-related condition and is awaiting consideration or implementation of reasonable adjustments that may facilitate a return to work, PBNi will consider whether a temporary extension of full pay may be appropriate as a reasonable adjustment.

Any such decision will be based on the individual circumstances of the case. Continuation of pay beyond contractual entitlement is not an automatic or mandatory reasonable adjustment.

9.5 Part-Time Employees

Part-time employees are entitled to sickness absence provisions on the same basis as full-time employees. OSP will be calculated on a pro-rata basis in line with their contractual working pattern.

9.6 Effect of Unpaid Sickness Absence

Periods of unpaid sickness absence:

- Count towards annual leave accrual only in accordance with the Working Time Regulations.
- Count towards NILGOSC membership for a maximum period of 12 months.

All sickness absence, whether paid or unpaid, will be included when calculating overall sickness absence levels for attendance management purposes.

9.7 Circumstances Where OSP May Be Withdrawn

PBNi may suspend or withdraw OSP where:

- The employee fails to comply with the Managing Attendance Policy and Procedure.

- Satisfactory medical evidence is not provided within five days of the expiry of a previous Fit Note.
- There is evidence that the absence is not due to genuine illness.
- There is no reasonable prospect of recovery and return to work, having regard to all relevant circumstances and policies.
- The employee fails to return to work within two weeks of being declared fit for work by Occupational Health.
- A decision is taken to withdraw OSP during the final review period following the issue of a Final Attendance Notice.
- The absence results from participation in professional sport, unless PBNi determines otherwise.
- The absence arises from the employee's own misconduct, unless PBNi determines otherwise.
- The employee is absent as a result of an accident for which compensation or damages may be recoverable from a third party.

9.8 Absence Due to Injury

Where an employee sustains an injury in the course of their duties, and without fault on their part, the absence will not count towards OSP entitlement limits. The absence will, however, be recorded for medical and attendance management purposes.

Where an absence results from an accident for which damages may be recoverable from a third party, the employee will not normally be entitled to OSP. However, PBNi may, at its discretion, advance an amount equivalent to the applicable sickness allowance, subject to the employee undertaking to repay all or part of the sum from any damages subsequently received.

Where the advance is repaid in full, the related absence may be disregarded for the purpose of calculating OSP entitlement. Where only partial repayment is made, PBNi will determine the extent to which the absence will count towards OSP entitlement.

All absences arising from workplace injuries or third-party accidents, including any related subsequent absences, will continue to be considered for attendance monitoring and review purposes.

9.9 Abuse of the Sick Pay Scheme

Any misuse or abuse of sickness absence or sick pay provisions, including falsely reporting sickness absence, will be managed under the Disciplinary Policy and Procedure.

10. Linked policies and guidance

- Disciplinary Policy and Procedure
- Grievance Policy and Procedure
- Dignity at Work Policy
- Performance Capability Policy
- Substance Misuse Policy
- Equal Opportunities Policy
- Disability (Workplace Adjustment) Passport and Guidance
- Hybrid Working Policy and Procedure
- Work Life Balance Guidance
- Extra-Mural Activity arrangements
- Annual Leave and Customary/Public Holidays Guidance
- Health and Safety Policy and Procedure
- Probation Handbook and terms and conditions of employment

10.1 Where policies overlap, HR will identify the principal process, explain this to the employee and avoid duplicate formal action on the same facts unless separate issues genuinely arise.

Managing Attendance Procedure

Procedure Applying to Every Sickness Absence

11. Notification and initial action

11.1 Notification of Absence

Employees who are unable to attend work due to illness or injury must notify their line manager at the earliest opportunity and no later than one hour after their normal start time. Notification should normally be made personally by telephone.

Text messages, emails, instant messaging applications, or communications through third parties should only be used in exceptional circumstances where the employee is unable to make direct contact.

When reporting an absence, the employee should provide, where known:

- The nature of the illness or injury.
- Whether the absence is related to a work-related injury or illness.
- Whether the absence arises from an accident involving a third party where compensation may be recoverable.
- Whether medical certification is available or anticipated.
- The expected duration of the absence and likely return date.
- Details of any urgent work commitments requiring attention during the absence.

Where sensitive personal or medical information is involved and the employee is unable to speak directly to their manager, they may provide limited information initially and discuss the matter further with their manager at the earliest appropriate opportunity. Confidentiality must be respected by all parties.

11.2 Work-Focused Discussion

During the initial notification, the manager should consider whether any temporary workplace support, adjustments, or alternative working arrangements could enable the employee to remain in work safely, where appropriate and without placing pressure on the employee to return before they are fit to do so.

This may include, for example:

- Temporary adjustments to duties.
- Amended work patterns.
- Hybrid or home working arrangements where suitable.
- Other short-term workplace supports.

PBNI recognises that employees do not always need to be fully fit to undertake productive work and that, in some circumstances, maintaining a connection with work may support recovery and wellbeing. Any arrangements agreed should be reviewed regularly.

11.3 Reporting Absence Through a Third Party

Where an employee is too unwell to make contact personally, a relative, friend, or other representative may notify the absence on their behalf.

The individual reporting the absence should provide:

- Their name.
- Their relationship to the employee.
- The reason why the employee is unable to make contact directly.
- The information outlined in Section 11.2, where available.

11.4 Unavailable Manager

Where the line manager is unavailable, the employee may report their absence to:

- The manager's nominated deputy;
- Another manager within the business area; or
- Human Resources.

The recipient of the notification must ensure that the information is passed to the appropriate manager as soon as reasonably practicable. The manager, or nominated deputy, should then make contact with the employee to discuss the absence and any appropriate support arrangements.

11.5 Recording Sickness Absence

Managers are responsible for recording sickness absence promptly and accurately on the relevant HR system.

Managers should:

- Record the absence and the reason for absence on the first day it is reported.
- Ensure records are updated throughout the period of absence where required.
- Record the employee's return-to-work date on their return.
- Notify HR of any absence that may require additional support, attendance review, or Occupational Health involvement.

11.6 Failure to Report Absence

Where an employee fails to attend work and has not notified their absence, the manager should make reasonable attempts to establish contact with the employee on the same day.

Where direct contact cannot be established, the manager may contact the employee's emergency contact details to confirm the employee's welfare. In exceptional circumstances, and following consultation with HR, further welfare checks may be considered where there are concerns regarding the employee's wellbeing or safety.

Failure to comply with sickness absence reporting arrangements may result in the absence being treated as unauthorised and may lead to action under the appropriate PBNl policy or procedure, including withdrawal of Occupational Sick Pay where applicable.

11.7 Change of Contact Details During Absence

Employees must remain reasonably contactable during periods of sickness absence.

Where an employee is temporarily staying at an address other than their normal home address during their absence, they must provide their manager with suitable contact details. The manager will ensure that HR records are updated as required.

Employees who intend to take a holiday during a period of sickness absence must notify their manager in advance.

11.8 Employees Becoming Ill Whilst at Work

Employees who become unwell during the working day must notify their manager as soon as possible. Where the manager is satisfied that the employee is unable to continue working, they may be authorised to leave work.

The remainder of that working day will not normally be recorded as sickness absence. However, the occurrence must be recorded on iTrentf or attendance monitoring, workforce planning and the identification of attendance patterns or support needs.

Where repeated occurrences arise, the manager may consider whether additional support, an Occupational Health referral or attendance management interventions are appropriate.

11.9 Notification of Return to Work

Employees must inform their manager as soon as they become fit to return to work or if they are able to return earlier than originally anticipated.

Where an employee is unable to return on the expected return date, they must continue to comply with the reporting and certification requirements set out in this Procedure.

Managers are responsible for ensuring the employee's return-to-work date is recorded and that the Return-to-Work process is initiated.

11.10 Extra Mural Activities During Sickness Absence

Employees who undertake approved Extra Mural Activities, including paid employment or voluntary work outside PBNI, must comply with the requirements of the Extra Mural Activity arrangements.

Employees on sickness absence would not normally be expected to continue such activities. Any employee wishing to continue an approved Extra Mural Activity during a period of sickness absence must obtain prior approval from their manager.

Participation in Extra Mural Activities during sickness absence may be considered as part of attendance management processes where relevant.

12. Certification Requirements

12.1 Purpose

Employees who are absent due to sickness must provide appropriate evidence of incapacity throughout the duration of their absence. Compliance with the certification requirements is a condition of Occupational Sick Pay (OSP) entitlement and assists PBNI in managing attendance and providing appropriate support.

12.2 Self-Certification

Employees may self-certify sickness absence for the first seven consecutive calendar days of absence, including weekends and public holidays. During this period, employees must comply with the sickness absence notification requirements set out in Section 11.

The reason for absence will be confirmed and recorded as part of the Return-to-Work process.

12.3 Withdrawal of Self-Certification

PBNI reserves the right to withdraw the self-certification facility where there is evidence of frequent or excessive short-term sickness absence.

In such cases, the employee may be required to provide a Fit Note for all future sickness absences, including absences of seven calendar days or less. Decisions will be considered on a case-by-case basis and communicated in writing to the employee. Any cost associated with obtaining additional medical certification will be the responsibility of the employee.

12.4 Absence of Eight Calendar Days or More

Where sickness absence exceeds seven consecutive calendar days, the employee must provide a Fit Note from their GP or other appropriate medical practitioner.

The employee should submit the Fit Note to their line manager as soon as reasonably practicable. Managers must forward medical certificates to HR without undue delay.

Where an employee experiences difficulties obtaining a Fit Note within the required timescale, they must inform their manager and HR as soon as possible and explain the reasons for the delay.

12.5 Continuing Sickness Absence

Where sickness absence continues beyond the expiry date of a Fit Note, the employee must ensure that further medical certification is submitted.

Updated Fit Notes should be provided within five working days of the expiry of the previous certificate. Where this is not possible, the employee must notify their manager and HR in advance where practicable.

Employees are responsible for ensuring that continuous certification is maintained throughout any period of sickness absence.

12.6 Failure to Provide Medical Certification

Failure to provide appropriate medical certification may result in:

- Occupational Sick Pay being withheld or withdrawn.
- The absence being treated as unauthorised.
- Consideration under other relevant PBNi procedures, including disciplinary procedures where appropriate.

Occupational Sick Pay may be reviewed where an employee fails to provide:

- A Fit Note within two weeks of the commencement of an absence requiring certification; or
- A replacement Fit Note within five working days of the expiry of a previous certificate,

and no satisfactory explanation has been provided.

12.7 Return to Work Before a Fit Note Expires

Employees may return to work before the expiry date shown on a Fit Note if they feel fit to do so.

A further medical certificate confirming fitness to return is not normally required. However, employees must notify their manager as soon as they know they are fit to resume duties so that appropriate return-to-work arrangements can be made.

12.8 Mental Health, Wellbeing and Personal Circumstances

PBNi recognises that mental health conditions, workplace stressors, and significant personal circumstances can affect attendance and wellbeing.

Employees are encouraged to discuss any issues affecting their health or attendance with their manager as early as possible so that appropriate support can be considered. A referral to Occupational Health will normally be considered where mental health concerns, stress-related conditions, or other wellbeing matters are affecting attendance or work capability.

Managers should focus on understanding the impact of the employee's circumstances on attendance and work, rather than requiring disclosure of personal information. Employees should be signposted to appropriate support services and wellbeing resources where relevant.

Where appropriate, employees may be offered the opportunity to complete a wellbeing or stress assessment questionnaire to help identify potential workplace or wellbeing support measures. Completion of any such questionnaire will be voluntary and treated confidentially.

13. Maintaining Contact During Sickness Absence

13.1 Purpose

PBNI recognises its duty of care to employees who are absent due to illness or injury and is committed to supporting their health, wellbeing, recovery and return to work.

Maintaining regular and appropriate contact during sickness absence enables PBNI to:

- Provide support to employees during periods of absence.
- Discuss any assistance or workplace adjustments that may be required.
- Keep employees informed of significant workplace developments where appropriate.
- Support planning for a safe and sustainable return to work.
- Ensure appropriate arrangements are in place to maintain service delivery.

Contact should be supportive, respectful and proportionate to the circumstances of the absence.

13.2 Responsibility for Maintaining Contact

Employees and managers share responsibility for maintaining appropriate contact during periods of sickness absence.

Employees are expected to:

- Maintain reasonable communication with their manager during their absence.
- Keep their manager informed of any significant changes in their medical condition.
- Advise of any change to an anticipated return-to-work date.
- Respond to reasonable attempts at contact from their manager.

Managers are expected to:

- Maintain regular and appropriate contact with employees during absence.

- Discuss any support or workplace adjustments that may assist recovery or return to work.
- Signpost employees to available wellbeing and support services where appropriate.
- Ensure contact is sensitive to the employee's circumstances.

13.3 Contact During Short-Term Absence

Where an absence continues beyond three consecutive working days, the employee should contact their manager on the fourth working day to provide an update on their condition and likely duration of absence.

Where the absence is expected to continue beyond seven calendar days, the employee must ensure that the appropriate Fit Note arrangements are followed in accordance with Section 12.

Managers may maintain contact during shorter absences where appropriate, particularly where:

- There are concerns regarding the employee's wellbeing.
- Additional support may be beneficial.
- The absence is likely to become prolonged.
- Service delivery arrangements need to be discussed.

13.4 Contact During Long-Term Absence

When an absence becomes long term, regular contact should be agreed between the employee and the manager.

The nature, frequency and method of contact should take account of:

- The nature of the illness or injury.
- Medical advice received.
- The employee's individual circumstances.
- The need to balance support with operational requirements.

Contact may take place through:

- Telephone conversations.

- Microsoft Teams or other virtual meetings.
- Written correspondence.
- Face-to-face meetings where appropriate and mutually agreed.

As a minimum, managers should ensure that reasonable contact is maintained throughout any extended absence. Contact arrangements may be reviewed and adjusted as circumstances change.

13.5 Content of Contact Discussions

Contact during sickness absence is intended to be supportive and may include discussion of:

- The employee's wellbeing and recovery.
- Current medical advice and anticipated timescales for recovery.
- Workplace developments that may affect the employee.
- Available wellbeing, occupational health or employee support services.
- Temporary workplace adjustments or rehabilitation arrangements.
- Any anticipated return-to-work plans.

Employees will not be expected to disclose detailed medical information beyond that reasonably required to support attendance management and return-to-work planning.

13.6 Employee Wellbeing and Support

Managers should take opportunities during contact to identify whether additional support may be helpful.

Support may include:

- Occupational Health referral.
- Workplace adjustments.
- Flexible working arrangements.
- Wellbeing services.
- Employee assistance or counselling services.
- Other support available through PBNl policies and procedures.

Where an employee indicates that mental health concerns, workplace issues, or personal circumstances are affecting their attendance or wellbeing, managers should seek to understand the impact of those issues and consider appropriate support measures.

Employees are encouraged to discuss concerns at an early stage so that support can be explored before difficulties become more significant.

13.7 Keeping Employees Informed

During periods of extended absence, managers should ensure that employees continue to receive important organisational information where appropriate.

This may include:

- Major organisational announcements.
- Changes affecting the employee's role or team.
- Development opportunities.
- Significant workplace updates relevant to the employee.

Employees should not be excluded from workplace communications solely because they are absent due to sickness.

13.8 Workplace Contact During Extended Absence

Where appropriate and agreed by the employee, contact with colleagues and the workplace may help maintain engagement during a period of extended sickness absence.

This may include:

- Informal visits to the workplace.
- Participation in agreed wellbeing or return-to-work discussions.
- Keeping in touch with colleagues socially or professionally.

Any such arrangements should be voluntary and supportive in nature. Employees must not feel under pressure to attend the workplace before they are fit to do so.

13.9 Exceptional Circumstances

In exceptional circumstances, direct contact between the employee and their line manager may not be appropriate.

Examples may include:

- A breakdown in the working relationship.
- A complaint or investigation involving the manager.
- Other circumstances which may reasonably affect effective communication.

In such cases, an alternative management contact will be nominated, normally a more senior manager, Area Manager, or another manager agreed with HR

14. Occupational Health and Workplace Support

14.1 Purpose

PBNI is committed to supporting employees whose health, wellbeing or disability may affect their attendance, performance, or ability to carry out their duties.

Occupational Health (OH) provides independent professional advice to support employees and managers in understanding the impact of health conditions on work, identifying appropriate support measures, and facilitating a safe and sustainable return to work.

Occupational Health is not a diagnostic service and employees should continue to seek medical advice and treatment from their GP or specialist where appropriate.

14.2 Principles

PBNI will seek to:

- Support employees to remain in work wherever reasonably practicable.
- Intervene at an early stage where health concerns may affect attendance or performance.
- Consider reasonable workplace adjustments where appropriate.
- Promote rehabilitation and recovery.
- Facilitate safe and sustainable returns to work.
- Ensure disability-related needs are appropriately considered.
- Balance employee wellbeing with operational requirements.

Each case will be considered on its individual circumstances.

14.3 Occupational Health Referrals

An Occupational Health referral may be made where medical advice is required to assist attendance management or workplace support arrangements.

Referrals will be coordinated through HR and discussed with the employee in advance where practicable. The line manager will be responsible for completing the referral documentation with support from HR where required.

14.4 Circumstances Where Referral May Be Appropriate

A referral to Occupational Health will be considered where:

- An employee has been absent for 20 working days or more (pro rata for part-time employees).
- A Fit Note indicates an expected absence of three weeks or more.
- An employee is absent due to stress, anxiety, depression, or another mental health condition.
- Frequent or recurring sickness absence indicates a possible underlying health condition.
- A health condition is affecting attendance, performance or workplace capability.
- Consideration is being given to workplace adjustments.
- A disability or long-term health condition may be impacting work.
- Patterns of absence indicate that additional support may be required.
- A health and safety concern exists.
- Occupational Health has recommended a follow-up review.
- The employee requests a referral to obtain advice or support.

Managers may also seek Occupational Health advice where work-related illness or injury is suspected.

14.5 Mental Health and Wellbeing

PBNI recognises the importance of supporting employees experiencing mental health difficulties or wellbeing concerns.

Where an employee reports absence due to stress, anxiety, depression or another mental health condition, managers should:

- Maintain supportive and appropriate contact.
- Consider an early Occupational Health referral.
- Discuss available wellbeing support services.
- Consider workplace factors that may be contributing to the situation.
- Explore measures that may assist the employee to remain in work or return to work safely.

Employees may be offered the opportunity to complete a wellbeing or stress assessment questionnaire to help identify support measures. Completion is voluntary and information provided will be treated confidentially.

Employees are encouraged to discuss any concerns affecting their mental health or wellbeing at the earliest opportunity.

14.6 Personal Circumstances Affecting Attendance

PBNI recognises that personal circumstances may affect an employee's health and attendance.

Employees are not required to disclose personal information; however, where managers are aware that personal circumstances are affecting attendance or wellbeing, they should focus on understanding the impact on work and identifying any support that may be available.

Support may include:

- Occupational Health referral.
- Wellbeing services.
- Flexible working arrangements.
- Workplace adjustments.
- Signposting to external support services.
- Support available under other PBNI policies and procedures.

14.7 Cooperation with Occupational Health

Employees are expected to participate fully in reasonable Occupational Health referrals and assessments.

Where Occupational Health appointments are arranged, employees should attend as scheduled or provide reasonable notice if they cannot attend.

Failure to participate in Occupational Health processes may:

- Limit the support that can be provided.
- Restrict the medical information available to inform decision-making.
- Result in attendance management decisions being based on the information available.
- Lead to consideration of Occupational Sick Pay arrangements in accordance with the Managing Attendance Policy.

Failure to engage with Occupational Health will not normally delay attendance management processes.

14.8 Occupational Health Recommendations

Occupational Health recommendations may include:

- Fit to return to work.
- Temporarily unfit for work.
- Fit to return to work with adjustments.
- Requirement for further review.
- Redeployment considerations.
- Permanent reduction in duties or hours.
- Ill-health retirement consideration.
- Permanent incapacity for work.

Managers will consider Occupational Health recommendations carefully and, where appropriate, discuss implementation with HR and the employee.

While recommendations will receive full consideration, they are advisory in nature and implementation will depend on operational feasibility and organisational requirements.

14.9 Workplace Adjustments

Where a health condition or disability affects an employee's ability to carry out their role, consideration will be given to temporary or permanent workplace adjustments.

Adjustments may include:

- Temporary modification of duties.
- Flexible working arrangements.
- Adjustments to working hours.
- Hybrid or home working arrangements.
- Specialist equipment.
- Workplace adaptations.
- Redeployment to an alternative role where appropriate.

Where disability-related adjustments are agreed, these should be recorded through the appropriate Workplace Adjustment or Disability Passport arrangements.

14.10 Phased Return to Work

A phased return to work may be considered following a significant period of sickness absence where medical advice indicates that a gradual return would assist rehabilitation and recovery.

The purpose of a phased return is to:

- Support a safe transition back to work.
- Enable employees to rebuild capacity and confidence.
- Reduce the risk of further absence.
- Facilitate a sustainable return to normal duties.

A phased return will:

- Be supported by appropriate medical advice.
- Operate for a maximum period of four weeks.
- Will equate to 60% of an employee working week with agreed working patterns and review arrangements.
- Be documented and monitored by the manager and HR.

Longer periods may be considered where supported by medical advice and approved by HR.

Non-working time will be recorded as sickness absence and paid accordingly. The non-working days during a phased return will not be counted towards absence review points.

14.11 Alternative Duties and Redeployment

Where an employee cannot immediately return to their substantive role, consideration may be given to:

- Temporary alternative duties.
- Modified responsibilities.
- Short-term alternative work arrangements.
- Permanent redeployment where appropriate and reasonably practicable.

Any such arrangements will be considered on a case-by-case basis and will take account of medical advice, service requirements and the reasonableness of proposed adjustments.

14.12 Ill-Health Retirement

Where Occupational Health advises that an employee may be permanently incapable of undertaking their duties, consideration may be given to ill-health retirement in accordance with the rules of the relevant pension scheme.

Such cases will be managed in consultation with HR, Occupational Health and the pension scheme administrators.

14.13 Review of Support Arrangements

Any workplace adjustments, rehabilitation plans, phased return arrangements or alternative working arrangements should be subject to regular review.

The purpose of review is to ensure that arrangements:

- Continue to meet the employee's needs.
- Remain operationally effective.
- Support attendance and wellbeing.
- Reflect current medical advice.

Where support measures are no longer effective, further Occupational Health advice may be sought and alternative options considered.

15. Return to Work

15.1 Purpose

Return-to-Work discussions are an essential part of the Managing Attendance Procedure. They provide an opportunity to welcome employees back to work, confirm the reason for absence, identify any support that may be required, and facilitate a safe and sustainable return to work. They also enable managers to monitor attendance levels and identify any emerging concerns at an early stage.

Return-to-Work discussions are intended to be supportive and constructive and are not, in themselves, part of the formal attendance management process.

15.2 Requirement to Participate

A Return-to-Work discussion must take place following every period of sickness absence, regardless of duration. Employees are expected to participate in the Return-to-Work process and managers are responsible for ensuring that it is completed.

The Return-to-Work record must be completed and retained in accordance with PBNI procedures.

15.3 Timing of the Return-to-Work Discussion

The Return-to-Work discussion should be completed as soon as reasonably practicable following the employee's return and, wherever possible, within five working days.

Where this is not possible, the reason for the delay should be recorded.

The discussion will normally be conducted by the employee's line manager. Where this is not practicable, an alternative manager may undertake the discussion following consultation with HR.

15.4 Attendance Recording and iTrent Requirements

Managers are responsible for ensuring that sickness absence records are accurately maintained on iTrent.

Managers must ensure that:

- All sickness absences are recorded promptly on iTrent from the first day of absence.
- The most appropriate reason for absence is recorded where known.
- Records are updated where further information becomes available.

- HR is informed where an absence may require Occupational Health involvement, workplace support, attendance review, or other intervention.
- The employee's return-to-work date is recorded on iTrent as soon as practicable following their return.
- Attendance records are maintained accurately to support absence monitoring, review point calculations, management reporting and decision-making.

iTrent records will form the official attendance record and will be used when assessing attendance trends, review points and attendance management actions under this Procedure.

15.5 Format of the Discussion

The format of the Return-to-Work discussion should be proportionate to the nature and duration of the absence.

The discussion may take place:

- Face-to-face.
- By telephone.
- Through Microsoft Teams or another agreed virtual platform.

Managers should use discretion to determine the most appropriate method, taking account of the circumstances of the absence.

15.6 Objectives of the Return-to-Work Discussion

The purpose of the discussion is to:

- Welcome the employee back to work.
- Confirm the dates and reason for absence.
- Ensure sickness notification and certification requirements have been met.
- Confirm that the employee feels fit to resume duties.
- Identify any ongoing health concerns or support needs.
- Discuss any temporary workplace adjustments that may assist the employee.
- Review whether the absence may be linked to an underlying medical condition or disability.

- Update the employee on any significant work-related developments during their absence.
- Ensure employees are aware of available wellbeing and support services.
- Identify whether attendance review points have been reached under this Procedure.

15.7 Health, Wellbeing and Workplace Support

Managers should use the Return-to-Work discussion as an opportunity to explore whether any support may be required to help the employee maintain attendance and remain in work.

This may include consideration of:

- Occupational Health referral.
- Temporary workplace adjustments.
- Flexible working arrangements.
- Disability Passport or Workplace Adjustment arrangements.
- Employee wellbeing support services.
- Other support available through PBNl policies and procedures.

Any discussion regarding health, personal circumstances, disability or wellbeing should be conducted sensitively, respectfully and confidentially.

15.8 Identifying Attendance Concerns

The Return-to-Work discussion provides an opportunity to identify emerging attendance concerns before formal review points are reached.

Where attendance is beginning to cause concern, managers should:

- Discuss attendance expectations.
- Reinforce the importance of regular attendance.
- Explore any underlying issues that may be contributing to absence.
- Consider whether support measures may be appropriate.
- Consider whether Occupational Health advice may be beneficial.

These discussions are intended to be supportive and preventative and do not constitute formal attendance action.

15.9 Attendance Review Points

Where a sickness absence results in an employee reaching a formal review point under Section 17, the manager should advise the employee that a Managing Attendance Meeting may be arranged.

Managers must ensure that attendance records on iTrent are accurate and up to date, as these records will be used to determine whether review points have been reached and whether further attendance management action is required.

The purpose of the Return-to-Work discussion is not to determine formal attendance outcomes. Any formal attendance review will be conducted through the Managing Attendance process.

15.10 Return Following Long-Term Sickness Absence

Where an employee returns following a period of long-term sickness absence, the Return-to-Work discussion should also consider:

- Any Occupational Health recommendations.
- Agreed workplace adjustments.
- Rehabilitation or phased return arrangements.
- Any health and safety considerations.
- Measures required to support a sustained return to work.

Where appropriate, a return-to-work plan should be agreed, documented and reviewed.

15.11 Recording the Discussion

A Return-to-Work record must be completed following every period of sickness absence.

The record should include:

- Dates of absence.
- Reason for absence.
- Confirmation that notification and certification requirements have been met.
- Any support measures or workplace adjustments discussed or agreed.
- Any referral actions identified.

- Whether a formal review point has been reached.
- Any agreed return-to-work arrangements.
- Any other relevant attendance management actions.

The completed Return-to-Work record should be agreed by the employee and manager where appropriate. Any areas of disagreement should be recorded.

Managers must:

- Update iTrent to reflect the employee's return-to-work date.
- Ensure that all absence information is accurately recorded.
- Submit completed Return-to-Work documentation to HR as soon as reasonably practicable and within five working days of completion.
- Retain records in accordance with PBNi record management requirements.

A copy of the completed Return-to-Work record should be made available to the employee

16. Management of Long-Term Sickness Absence

16.1 Purpose

PBNi is committed to supporting employees who experience long-term illness and to facilitating a safe and sustainable return to work wherever reasonably practicable. Early intervention, regular communication and appropriate workplace support are central to the effective management of long-term sickness absence.

16.2 Definition of Long-Term Sickness Absence

For the purposes of this Procedure, long-term sickness absence is defined as a continuous period of sickness absence of four weeks or more.

The fact that an absence is classified as long term does not imply any judgement regarding the employee's health condition, prognosis or future employment. Each case will be considered on its individual circumstances.

16.3 Early Intervention

As soon as it becomes apparent that an absence may become long term, managers should, in consultation with HR, consider the support and interventions that may assist the employee's recovery and return to work.

This may include:

- Occupational Health referral.
- Workplace adjustments.
- Temporary modification of duties.
- Phased return planning.
- Flexible working arrangements.
- Referral to available wellbeing support services.

Where an employee is absent due to mental health difficulties, stress-related illness or other complex medical conditions, Occupational Health advice should normally be sought at an early stage.

16.4 Long-Term Absence Review Meetings

Formal Long-Term Absence Review Meetings are compulsory and will normally be held, subject to any medical advice received, when an employee has been continuously absent for:

- One month (can be deferred for up to two weeks to allow for OH referral)
- Three months.
- Six months.

Additional review meetings may be arranged where appropriate, depending on the circumstances of the case.

These meetings form a formal part of the Managing Attendance Procedure and are intended to ensure that appropriate support, advice and consideration are given throughout the period of absence.

16.5 Purpose of Review Meetings

The purpose of a Long-Term Absence Review Meeting is to:

- Review the employee's health and recovery progress.
- Consider current medical advice.

- Review Occupational Health recommendations where available.
- Explore any workplace adjustments or supports that may facilitate a return to work.
- Discuss anticipated timescales for recovery and return to work.
- Consider whether further medical advice is required.
- Review the impact of the absence on service delivery.
- Agree next steps and ongoing support arrangements.

Review meetings should be conducted sensitively and in a supportive manner, recognising the employee's individual circumstances.

16.6 Arrangements for Review Meetings

Review meetings will normally be chaired by the employee's line manager, supported by HR.

Employees will be provided with reasonable notice of the meeting and will have the right to be accompanied by:

- A trade union representative; or
- A workplace colleague.

The format of the meeting will take account of the employee's health and circumstances and may take place:

- In person.
- By telephone.
- Via Microsoft Teams or another agreed platform.

Where an employee is unable to participate for medical reasons, alternative arrangements may be considered following consultation with HR.

16.7 Matters to be Considered

During a review meeting, consideration may be given to:

- The nature of the illness or injury.
- Current prognosis and likely timescales for recovery.
- Information provided by the employee.
- Occupational Health advice.

- Workplace Adjustment Passport arrangements.
- Temporary or permanent workplace adjustments.
- Phased return-to-work arrangements.
- Alternative duties or redeployment opportunities.
- Ill-health retirement considerations, where appropriate.
- The sustainability of the absence for both the employee and the organisation.

The focus should remain on identifying practical measures that may support a return to work wherever possible.

16.8 Outcomes of Review Meetings

Following a Long-Term Absence Review Meeting, one or more of the following outcomes may apply:

- Continued sickness absence with ongoing review.
- Occupational Health referral or further Occupational Health advice.
- Agreement of workplace adjustments.
- Development of a return-to-work plan.
- Introduction of a phased return-to-work programme.
- Consideration of alternative duties or redeployment.
- Consideration of ill-health retirement.
- Referral for further consideration under this Procedure where the absence is becoming unsustainable.

The outcome of each review meeting must be confirmed in writing and retained on the employee's HR file.

16.9 Six-Month Review and Further Consideration

Where an employee remains absent at the six-month review stage and there is no agreed or reasonably foreseeable return-to-work date, the case may be referred to the Head of HR and an appropriate Director for further consideration.

In making any referral, consideration should be given to:

- Current medical advice.

- Occupational Health recommendations.
- Prospects of recovery and return to work.
- Workplace adjustments already considered or implemented.
- Any exceptional circumstances affecting the case.

Examples of circumstances that may justify a further period of review include:

- A significant medical appointment, treatment or procedure is imminent.
- A return-to-work date is anticipated in the near future.
- Agreed workplace adjustments are awaiting implementation.
- Further medical evidence is expected within a reasonable timescale.

Any request to postpone this meeting, must be referred to the Head of HR and the Director who will decide if this can be approved. The meeting may, at the discretion of the Head of HR and the Director be postponed for up to nine months after the date the absence started.

The ill-health dismissal process may be reactivated without recommencing earlier stages of the procedure where an employee has previously been under consideration for ill-health dismissal, returns to work for a short period (up to a maximum of three months return) but subsequently requires further sick absence.

16.10 Consideration of Capability Dismissal

All relevant documentation will be provided to the Head of HR and Director including up to date OH advice.

After a referral, the Head of HR, on behalf of the Director, will invite the employee to a meeting with the Director. The letter will:

- Invite the employee to the meeting on a mutually acceptable date, time and location.
- Reinforce that the outcome of the meeting will be to ensure that all possible steps are taken to ensure an employee's employment is maintained but also ensure that the employee understands that one possible outcome may be dismissal on the grounds of ill health.
- Give at least five working days' notice of the meeting.

- Refer to previous Review Meetings held with their manager (if applicable), together with copies of documentation from those Review Meetings and other relevant information e.g. OH reports.
- Inform the employee that they have the right to bring a trade union representative or workplace colleague. If the employee or their trade union representative cannot attend the first scheduled meeting date, they have the right to re-arrange the meeting once, but normally only to a further five working days.
- Advise that if the employee refuses or fails to attend the meeting without an acceptable explanation, a decision may be made in their absence.

The purpose of the meeting is to allow the employee and / or their representative to put forward reasons why dismissal on ill-health grounds should not ensue. The Head of HR and the Director will listen carefully to any points made by the employee before considering whether a decision to dismiss in all the circumstances is appropriate.

The role of the Head of HR is to ensure consistency, take notes and advise on points of process or relevant employment law. The decision to dismiss a permanent employee may only be taken by a Director.

The Head of HR & OD and the Director will review all actions taken to ensure that all procedures have been followed correctly.

The Director may decide that:

- The matter does not merit consideration of dismissal on ill-health grounds.
- The matter merits consideration under another PBNi policy and procedure.
- The matters in relation to the employee's health/attendance may be addressed by measures other than dismissal.
- The final decision on the matter be adjourned for a specified period.
- Dismissal on ill-health grounds is appropriate.
- Action short of dismissal is appropriate e.g. change of role or relocation.

The Director will inform the employee of the decision within five working days following the meeting.

In communicating the decision to the employee, the letter will:

- Include a clear statement of the duration of the absence, and the discussion.

- State what further action is proposed if the decision is not to dismiss.
- Confirm that they are being dismissed on grounds of ill-health
- Provide the period of notice they will be given (or pay in lieu of notice)
- Provide information on the right of appeal and how to exercise that right [see section 18].

16.11 Written Confirmation and Record Keeping

Following each Long-Term Absence Review Meeting, HR will issue a written summary of:

- The matters discussed.
- Any medical or Occupational Health advice considered.
- Any support measures or workplace adjustments agreed.
- The actions required by any party.
- Review arrangements and timescales.
- Any potential implications should the absence continue.

Records of all meetings, correspondence and decisions will be retained in accordance with PBNI record management requirements. Relevant attendance information should also be accurately maintained on iTrent.

17. Attendance Review Process

17.1 Purpose

PBNI recognises that employees may experience periods of sickness absence during their employment. However, where attendance levels become unsatisfactory or unsustainable, attendance will be reviewed to ensure appropriate support is provided and to maintain effective service delivery.

The purpose of the Attendance Review Process is to:

- Identify and address attendance concerns at an early stage.
- Understand the reasons for absence.
- Provide reasonable support to improve attendance.
- Consider any health, wellbeing or workplace factors affecting attendance.

- Promote sustained and regular attendance.
- Ensure attendance is managed fairly, consistently and compassionately.

17.2 Attendance Review Points

An attendance review may be triggered where an employee reaches either of the following review points within a rolling twelve-month period:

- Four separate periods of sickness absence; or
- Ten working days of sickness absence.

For part-time employees and employees working compressed hours, review points will be applied on a pro-rata basis.

Attendance records held on iTrent will be used to determine whether review points have been reached. Managers are responsible for ensuring attendance records are accurate and up to date.

Reaching a review point does not automatically result in formal action. Each case will be considered on its individual merits.

17.3 Managing Attendance Meetings

Where a review point is reached, a Managing Attendance Meeting (MAM) will be arranged.

The Managing Attendance Meeting is a formal part of the Managing Attendance Procedure and provides an opportunity to:

- Review the employee's attendance record.
- Explore the reasons for absence.
- Discuss any underlying health or workplace issues.
- Consider support measures and workplace adjustments.
- Determine whether further attendance management action is required.

The meeting should be viewed as a supportive intervention intended to improve attendance and support employee wellbeing wherever possible.

17.4 Convening a Managing Attendance Meeting

A Managing Attendance Meeting should normally be arranged within ten working days of the employee's return to work following the absence that triggered the review point.

HR will support the line manager in arranging the meeting and will normally attend to provide advice, guidance and procedural support.

The employee will be provided with written notification of the meeting, which will include:

- The reason for the meeting.
- A summary of the relevant attendance record.
- Copies of relevant documentation where appropriate.
- Details of the date, time and location of the meeting.
- Information regarding the right to be accompanied.

Employees will normally be given at least five working days' notice of the meeting.

17.5 Right to be Accompanied

Employees have the right to be accompanied at a Managing Attendance Meeting by:

- A recognised trade union representative; or
- A workplace colleague.

If the employee's representative is unavailable on the proposed meeting date, one alternative date may be agreed within a reasonable timescale.

17.6 Matters to be Considered

The Managing Attendance Meeting will consider all relevant information, including:

- The employee's attendance record.
- The frequency, duration and pattern of absence.
- Any underlying medical conditions.

- Any disability-related considerations.
- Occupational Health advice, where available.
- Workplace adjustments already implemented or under consideration.
- Previous attendance discussions or support measures.
- Any explanation or representations made by the employee.

Managers should seek to identify whether further support, intervention or adjustment may help improve attendance.

17.7 Support Measures

Before determining whether formal attendance action is appropriate, managers should consider whether additional support measures may assist the employee.

This may include:

- Referral to Occupational Health.
- Temporary or permanent workplace adjustments.
- A Workplace Adjustment Passport.
- Flexible working arrangements.
- Wellbeing support services.
- Support available under other PBNl policies and procedures.

The availability of support measures does not prevent attendance management action where attendance remains unsatisfactory or unsustainable.

17.8 Attendance Outcomes

Following a Managing Attendance Meeting, one or more of the following outcomes may apply:

- No further action.
- Ongoing attendance monitoring.

- Occupational Health referral or review.
- Workplace support or adjustments.
- First Written Attendance Notice.
- Final Written Attendance Notice.
- Referral for consideration of dismissal where attendance has become unsatisfactory or unsustainable.

The outcome will be determined based on the circumstances of the case and the information available at the time of the meeting.

17.9 Exceptional Circumstances

Managers may decide that a formal attendance notice is not appropriate despite a review point being reached, based on exceptional circumstances. Each case must be considered on its individual circumstances.

Any such decision must:

- Be discussed with HR.
- Be fully documented, including the reasons for the decision.

17.10 Recognition of Previous Good Attendance

When determining an appropriate outcome, managers may take account of an employee's attendance record over the previous three years.

Where an employee has demonstrated a sustained pattern of good attendance and there are exceptional reasons for the recent deterioration in attendance, this may be considered when determining whether a Written Attendance Notice is appropriate. Any decision to depart from the normal process must be discussed with HR and recorded.

17.11 First Written Attendance Notice

A First Written Attendance Notice will be issued where:

- A review point has been reached; and

- Attendance is considered unsatisfactory or unsustainable; and
- The circumstances do not justify an alternative outcome.

The Notice will remain live for a period of **12 months** from the date of issue.

The Notice will:

- Set out the attendance concerns identified.
- Explain the improvements required.
- Confirm the review period.
- Identify any support measures available.
- Explain the consequences of failing to achieve a sustained improvement in attendance.
- Explain the employee's right of appeal.

For attendance monitoring purposes, attendance will be measured from the date the Notice is issued.

During the review period, employees will be expected to maintain attendance below the applicable review point thresholds.

17.12 Review Period

During the review period, managers will continue to:

- Monitor attendance levels.
- Conduct Return-to-Work discussions where appropriate.
- Consider any additional support that may be required.
- Seek Occupational Health advice where necessary.
- Review workplace adjustments and wellbeing measures.

The aim of the review period is to support the employee in achieving a sustained improvement in attendance.

Where attendance improves and remains satisfactory throughout the review period, no further action will normally be taken.

17.13 Final Written Attendance Notice

A Final Written Attendance Notice may be issued where:

- A live First Written Attendance Notice is in place; and
- Attendance has not improved sufficiently; or
- Attendance has deteriorated further during the review period.

A Final Written Attendance Notice will remain live for **12 months** from the date of issue.

The Notice will:

- Set out the attendance concerns.
- Confirm the attendance standards required.
- Specify the duration of the review period.
- Confirm any support measures being provided.
- Explain that further unsatisfactory attendance may result in dismissal being considered.
- Explain the employee's right of appeal.

For attendance monitoring purposes, attendance will be measured from the date the Final Written Attendance Notice is issued.

17.14 Referral for Consideration of Dismissal

Referral for dismissal consideration may occur where:

- Attendance remains unsatisfactory during the currency of a Final Written Attendance Notice; or
- Attendance is considered unsustainable despite support, adjustments and interventions; or

- Previous attendance management measures have failed to achieve the required improvement.

A referral will be made to the Head of HR and an appropriate Director.

The referral documentation should include:

- A summary of the employee's attendance record.
- Details of support measures provided.
- Relevant Occupational Health advice.
- Details of any workplace adjustments considered or implemented.
- Copies of previous attendance management outcomes.

A copy of the attendance summary relied upon will be provided to the employee.

17.15 Dismissal Meeting

Where dismissal is being considered, the employee will be invited to a formal meeting with a Director, supported by the Head of HR or nominated representative.

The employee will:

- Receive written notification of the meeting.
- Be provided with relevant documentation.
- Be advised that dismissal is a potential outcome.
- Be given reasonable notice of the meeting.
- Have the right to be accompanied by a trade union representative or workplace colleague.

The purpose of the meeting will be to consider all relevant information before determining whether dismissal is appropriate.

17.16 Outcomes Following Dismissal Consideration

Following the meeting, the Director may determine that:

- No further action is required.
- Further attendance monitoring is appropriate.
- Additional support measures should be implemented.
- Another PBNi policy or procedure should be considered.
- A further review period is appropriate.
- Action short of dismissal is appropriate.
- Dismissal on the grounds of unsatisfactory or unsustainable attendance is appropriate.

Only a Director may authorise dismissal under this Procedure.

17.17 Written Confirmation and Record Keeping

Employees will receive written confirmation of any formal attendance outcome within five working days of the meeting.

The outcome letter will include:

- The decision reached.
- The reasons for the decision.
- Any attendance standards or review arrangements.
- Any support measures to be implemented.
- The consequences of failing to achieve the required improvement.
- Information regarding the right of appeal.

All attendance notices, correspondence and decisions must be retained on the employee's HR file. Relevant attendance information must also be accurately maintained on iTrent.

18. Appeals

18.1 Right of Appeal

Employees have the right to appeal against any formal outcome issued under this Procedure, including:

- A First Written Attendance Notice.
- A Final Written Attendance Notice.
- Dismissal on the grounds of unsatisfactory attendance.
- Dismissal on the grounds of unsustainable attendance or capability arising from ill health.

Appeals provide an opportunity for a formal outcome to be reviewed by an independent manager who was not involved in the original decision.

18.2 Grounds of Appeal

An appeal may be submitted on one or both of the following grounds:

- The Procedure was not followed correctly and this may have affected the outcome; and/or
- The outcome or sanction imposed was unreasonable in the circumstances.

Employees should clearly set out the reasons for their appeal and provide any supporting information or documentation they wish to be considered.

18.3 Submitting an Appeal

Appeals must be submitted in writing within **ten working days** of the employee receiving written notification of the outcome being appealed.

The written appeal should include:

- The outcome being appealed.
- The grounds of appeal.
- Any supporting evidence the employee wishes to rely upon.
- The outcome sought by the employee.

The timescale for submitting an appeal may be extended in exceptional circumstances following consultation with HR.

18.4 Appeal Arrangements

Upon receipt of an appeal, an Appeal Manager will be appointed who has had no previous involvement in the matter and who is senior to the manager who made the original decision.

HR will support the appeal process and provide procedural advice throughout.

The employee will receive written confirmation of:

- The date, time and format of the appeal meeting.
- The manager hearing the appeal.
- Any documentation to be considered.
- Their right to be accompanied.

Appeal meetings should be convened within ten working days of the appeal being received, where reasonably practicable.

18.5 Right to be Accompanied

Employees have the right to be accompanied at an appeal meeting by:

- A recognised trade union representative; or
- A workplace colleague.

Where the employee's chosen representative is unavailable on the proposed date, one alternative date may be arranged within a reasonable timescale.

18.6 Appeal Meeting

The Appeal Manager will review:

- The original decision.
- The grounds of appeal.
- Any supporting evidence submitted.
- Any representations made by the employee or their representative.

- Any advice provided by HR in relation to procedure.

The purpose of the appeal is not to repeat the original meeting in full, but to determine whether the original decision was reasonable and whether the Procedure was applied correctly.

The Appeal Manager may adjourn the meeting where further information is required before reaching a decision.

18.7 Appeal Outcomes

Following consideration of the appeal, the Appeal Manager may:

- Uphold the original decision.
- Revoke the original decision.
- Substitute a lesser outcome where appropriate.
- Refer the matter back for further consideration or a rehearing where procedural concerns have been identified.

The Appeal Manager's decision will normally be confirmed in writing within five working days of the appeal meeting.

The written outcome will include:

- The decision reached.
- The reasons for the decision.
- Any further action to be taken.
- The date on which the decision takes effect.

18.8 Appeals Against Attendance Notices

Appeals against First Written Attendance Notices and Final Written Attendance Notices will be heard by a manager who is senior to the manager who issued the original outcome and who has had no prior involvement in the case.

The decision reached at appeal will be final and there will be no further internal right of appeal.

18.9 Appeals Against Dismissal

Appeals against dismissal will be heard by the Chief Executive or another appropriately authorised senior officer who was not involved in the original decision.

The appeal will review whether:

- The Procedure was applied correctly.
- Relevant information was fully considered.
- The decision to dismiss was reasonable in the circumstances.

Following the appeal, the decision-maker may:

- Uphold the dismissal.
- Revoke the dismissal.
- Replace the dismissal with an alternative outcome.

The appeal decision will be final and there will be no further internal right of appeal.

18.10 Appeals Involving Senior Managers

Where the original decision involves a Director, Head of Department reporting directly to the Chief Executive, or another senior officer for whom the Chief Executive would not be the appropriate appeal manager, the appeal will be heard by the Board Chair, another Board Member or another appropriately authorised representative of the Board.

Where a Board representative hears an appeal, they may seek advice from HR and/or the Board Secretary regarding procedural matters.

18.11 Records and Documentation

HR will maintain a record of all appeal documentation, correspondence, decisions and outcomes in accordance with PBNl record management requirements. Relevant records

relating to attendance management outcomes should also be updated and retained on the employee's HR record and associated systems, including iTrent where applicable.

19. Employees in Their First Year of Employment

19.1 Purpose

Attendance is an important aspect of assessing suitability for continued employment during an employee's probationary period. PBNi recognises that new employees may experience periods of sickness absence; however, a satisfactory level of attendance is an important requirement when determining whether an appointment should be confirmed.

Attendance during the probationary period will, therefore, be monitored closely and managed in accordance with this Procedure.

19.2 Attendance Review Points During Probation

Employees in their first year of employment are subject to lower attendance review thresholds than established employees.

A formal attendance review may be considered where a probationary employee reaches:

- Two separate periods of sickness absence; or
- The applicable number of working days' sickness absence shown below within a rolling twelve-month period.

Working Days per Week	Number of Absences	Working Days Absent
5	2	5
4	2	4
3	2	3
2	2	2

For part-time employees, attendance thresholds will be applied on a pro-rata basis.

Attendance records held on iTrent will be used when assessing attendance levels and determining whether review points have been reached.

19.3 Attendance Management During Probation

Where a review point is reached, attendance will be reviewed in accordance with this Procedure.

PBNI will seek to support probationary employees in achieving and maintaining satisfactory attendance through:

- Return-to-Work discussions.
- Managing Attendance Meetings.
- Occupational Health referrals where appropriate.
- Workplace adjustments where required.
- Wellbeing and support measures.
- Attendance improvement periods.

Any health condition, disability, workplace adjustment requirement or other relevant individual circumstance will be considered when determining the appropriate course of action.

19.4 Probation Reviews and Support

Attendance concerns should be addressed as early as possible during the probationary period.

Managers should ensure that probationary employees are:

- Made aware of attendance expectations.
- Advised when attendance concerns arise.
- Given an opportunity to discuss any issues affecting attendance.
- Offered appropriate support and guidance.

Attendance should be considered alongside performance, conduct and overall suitability for the role.

19.5 Extension of Probation

Where attendance concerns arise during the probationary period, consideration may be given to extending the probationary period to allow further monitoring and support.

The length of any extension will depend on the circumstances of the case and the period required to assess whether a satisfactory and sustained improvement in attendance can be achieved.

The employee will be informed in writing of:

- The reason for the extension.
- The duration of the extension.
- The attendance standards required.
- Any support measures available during the extension period.

19.6 Formal Attendance Outcomes During Probation

Before any decision is taken regarding termination of employment on attendance grounds, PBNI will ensure that:

- Attendance concerns have been discussed with the employee.
- Appropriate support and guidance have been provided.
- Relevant medical information has been considered.
- Occupational Health advice has been obtained where appropriate.
- Workplace adjustments have been considered where required.
- The employee has been provided with an opportunity to improve attendance.

Where attendance remains unsatisfactory or unsustainable despite support and intervention, formal attendance outcomes under this Procedure may be applied, including the issue of a First Written Attendance Notice and Final Written Attendance Notice.

Given the shorter period available to assess suitability during probation, review periods may be shorter than those normally applied to established employees.

19.7 Long-Term Sickness Absence During Probation

Where a probationary employee is absent on long-term sickness absence, PBNi may consider alternatives to a standard attendance improvement period, including:

- Setting a return-to-work objective.
- Extending the probationary period.
- Obtaining Occupational Health advice.
- Agreeing workplace support measures.
- Reviewing suitability for continued employment based on the information available.

Each case will be considered individually, taking account of medical advice, operational requirements and any legal obligations.

19.8 Dismissal During Probation

Where attendance remains unsatisfactory or unsustainable and all reasonable steps have been taken to support improvement, employment may be terminated during or at the end of the probationary period.

Before a decision is made, the employee will:

- Be informed of the concerns regarding attendance.
- Be invited to a formal meeting.
- Be given the opportunity to respond to the concerns raised.
- Have the right to be accompanied by a trade union representative or workplace colleague.

Any decision to dismiss must be authorised by the appropriate manager in accordance with PBNi governance arrangements.

19.9 Right of Appeal

An employee dismissed during their probationary period on attendance grounds has the right to appeal in accordance with Section 18 of this Procedure.

The appeal will be heard by a manager who was not involved in the original decision and who is appropriately senior to the decision-maker.

20 Wellbeing

20.1 Annual Leave as a Wellbeing Day

A wellbeing day is a short-notice request to use annual leave where an employee is not unfit for work but considers that a day away from work would support their wellbeing.

Employees may normally request up to three wellbeing days in each leave year. Approved wellbeing days will be deducted from the employee's annual leave entitlement and do not provide an additional leave entitlement.

Requests for additional wellbeing days may be considered in exceptional circumstances, including where an employee is experiencing menopause-related symptoms. Where a request relates to a disability, it must be considered separately under the organisation's reasonable adjustment arrangements and will not necessarily be subject to the normal three-day limit.

An employee who is unfit for work must report sickness absence in accordance with this policy and should not request a wellbeing day instead.

Employees must contact their line manager as soon as possible on the day of the request and no later than one hour after their normal starting time. If the line manager is unavailable, the employee must contact the covering manager or, where no covering manager is available, a more senior manager.

A wellbeing day is not an automatic entitlement and is subject to management approval. Employees should not normally request a wellbeing day where they have significant or urgent work commitments, including service user meetings, critical deadlines or other essential duties.

When considering a request, the manager must take account of:

- the employee's individual circumstances;

- operational and service delivery requirements;
- staffing levels and the availability of appropriate cover;
- significant or urgent work commitments; and
- the need to act fairly and consistently.

Where a request cannot reasonably be accommodated and the employee is fit for work, they will be expected to attend work as normal.

Approved wellbeing days must be recorded as annual leave through the organisation's approved recording system. Managers must not maintain separate informal records containing unnecessary health or disability information.

Any health information provided in support of a request must be handled confidentially and in accordance with the organisation's data protection and records management requirements.

The use of wellbeing days may be discussed during supervision where appropriate, particularly where repeated requests may indicate that the employee would benefit from additional support or a workplace adjustment.

21. Sickness Absence: Annual Leave, Flexi Leave and Time Off in Lieu

21.1 Annual Leave Requested During Sickness Absence

An employee who is unfit for work must report their absence as sickness absence and comply with the notification and certification requirements set out in this procedure.

An employee may request to take annual leave during a period of sickness absence. The request must be made expressly by the employee and will be considered in accordance with the organisation's annual leave arrangements.

Where annual leave is approved:

- the agreed period will be treated as annual leave rather than sickness absence for pay and recording purposes;
- the relevant amount will be deducted from the employee's annual leave entitlement; and

- the employee's absence record must clearly identify the date on which the approved annual leave begins and, where applicable, ends.

An employee must not use annual leave to avoid reporting an absence correctly as sickness absence.

Flexi leave or TOIL, may not be substituted for sickness absence.

21.2 Sickness During Annual Leave, Flexi Leave or TOIL

An employee who becomes unfit for work during annual leave, flexi leave or TOIL must notify their line manager as soon as reasonably practicable.

The employee must comply with the sickness notification and certification requirements set out in the relevant sections of this policy and provide:

- the date on which they became unfit for work;
- the nature and expected duration of the illness, where known;
- appropriate self-certification or medical evidence; and
- any other information reasonably required to manage and record the absence.

Subject to compliance with the notification and evidence requirements, the period during which the employee was unfit for work will be recorded as sickness absence and the corresponding annual leave will be reinstated.

The treatment of flexi leave or TOIL affected by sickness will be determined in accordance with the relevant organisational scheme.

HR advice must be obtained where:

- the request to convert leave to sickness absence is made retrospectively;
- the employee was outside the United Kingdom when they became unwell;
- the notification or supporting evidence is incomplete or unclear;
- there is a dispute about the relevant dates; or
- there are other exceptional circumstances.

21.3 Annual Leave, Flexi Leave or TOIL Following Sickness Absence

An employee may request annual leave, flexi leave or TOIL immediately following a period of sickness absence, including the end of a phased return period.

Where the employee will not physically return to work before the requested leave begins, the line manager must contact the employee to:

- confirm whether the employee considers themselves fit for work;
- establish the date on which the sickness absence ends;
- clarify the date on which the requested leave would begin; and
- identify whether any support or workplace adjustment may be required when the employee returns.

Approval remains subject to the relevant annual leave, flexi leave or TOIL arrangements and operational requirements.

A Return-to-Work Meeting must be completed as soon as reasonably practicable after the employee physically returns to work. The meeting should confirm the employee's fitness to resume work and identify any support, referral or workplace adjustment that may be required.

In many cases employees will have accrued annual leave during a period of long-term sick absence. Annual leave could be taken to continue a part working week or in block periods, to allow management of leave balances subject to line manager agreement and approval.

21.4 Holidays or Time Away from Home During Sickness Absence

Employees who intend to take a holiday or spend time away from their normal home address during sickness absence must comply with the requirements set out in Section 13 of this policy.

Any time away from the employee's normal home address must be consistent with their recovery and must not prevent them from meeting reasonable contact, medical assessment, Occupational Health or attendance management requirements.

21.5 Carry-Over of Annual Leave Following Long-Term Sickness Absence

Annual leave continues to accrue during sickness absence in accordance with statutory requirements and the employee's contractual terms.

Where an employee has been unable to take annual leave because of sickness absence, they may carry forward the untaken portion of the four-week statutory annual leave entitlement provided for under the Working Time Regulations (Northern Ireland) 2016.

The amount carried forward will take account of any portion of that four-week statutory entitlement already taken during the relevant leave year. Untaken portion of employees overall leave entitlement may also be carried forward, up to a maximum inclusive total of 28 days.

Leave carried forward because of sickness absence must be taken within 18 months from the end of the leave year in which the entitlement originally arose.

Employees are expected to take annual leave during the leave year wherever reasonably practicable.

Managers must:

- provide employees with a reasonable opportunity to take their statutory annual leave;
- encourage employees to take their leave during the relevant leave year;
- monitor outstanding leave where an employee has experienced long-term sickness absence; and
- inform employees where untaken leave may be lost if it is not taken within the applicable period.

HR advice must be obtained where there is uncertainty regarding:

- the amount of leave that may be carried forward;
- whether the inability to take leave resulted from sickness absence;
- the period within which carried-over leave must be taken;
- the interaction between statutory and contractual leave; or
- the treatment of leave when employment is ending.

21.6 Sick Pay During Notice Following Resignation

Where an employee becomes unfit for work while serving notice following resignation, the absence must be reported, certified and managed in accordance with this policy.

Entitlement to Statutory Sick Pay and Occupational Sick Pay will be determined based on their entitlement the day before their notice period.

Occupational Sick Pay must not be withheld solely because the employee has resigned.

Any proposal to restrict or withhold Occupational Sick Pay during a notice period must be referred to HR for review. The employee must be informed in writing of the decision, the contractual or policy basis for it and the effect on their pay.

Employees will remain entitled to Statutory Sick Pay where they meet the applicable statutory eligibility requirements.

Where there is any uncertainty regarding sick pay, notice pay or contractual entitlement, advice must be obtained from HR before a decision affecting the employee's pay is made.

22. Time Off for Medical, Dental and Optician Appointments

22.1.1 General Provisions

Employees should, wherever possible, arrange medical, dental and optician appointments outside normal working hours. Where this is not practicable, appointments should be arranged at times that balance healthcare needs with operational requirements. Managers will work with employees to facilitate attendance at essential appointments while minimising disruption to service delivery.

PBNI will normally provide paid time off for up to six medical, dental or optician appointments per leave year, pro rata for part-time employees. A maximum of three hours' paid time off, including travelling time, may be taken for each appointment.

Employees should, where possible, arrange appointments to minimise time away from work, for example:

- Late afternoon appointments, leaving work no earlier than 2.00 pm.
- Morning appointments, returning to work no later than 12.00 noon.

Where more than three hours is required, employees should discuss appropriate arrangements with their line manager. Options may include:

- Making up the additional time through an agreed flexible working arrangement.
- Using TOIL or Flexi Leave.
- Taking unpaid leave for the excess time.
- Taking annual leave for the entire period of absence, in which case the appointment will not count towards the annual allocation of six appointments.

Where a hospital or outpatient appointment requires a full day away from work, the three-hour limit will not apply. Such appointments will count towards the annual allocation of six appointments, and employees must provide evidence of attendance if requested.

Employees requiring ongoing treatment for a serious medical condition, or whose attendance requirements arise from a disability within the meaning of the Disability Discrimination Act 1995, may be granted up to six additional paid appointments per leave year (pro rata for part-time employees), subject to consideration of individual circumstances and operational requirements. Occupational Health advice may be sought where appropriate.

Where treatment results in a period of incapacity or recovery time, any resulting absence will be recorded and managed as sickness absence under the Managing Attendance Procedure. Employees must submit self-certification or Fit Notes in accordance with normal absence reporting requirements.

Unused appointment allowances cannot be carried forward to a subsequent leave year.

Except in urgent or emergency circumstances, employees must notify their line manager of an appointment at least three days in advance. Where this is not possible, notification should be provided as soon as reasonably practicable. Managers may request evidence of an appointment.

Where an urgent medical appointment is required on the day of absence, the employee, or someone acting on their behalf, should contact their line manager as soon as possible and preferably within one hour of their normal start time.

Time off for medical appointments must be recorded using the appropriate attendance recording code and on iTrent. Managers must retain appropriate records of appointments, including use of the approved recording template where required.

22.2 Counselling, Staff Support and Cancer Screening

Paid time off to attend:

- Counselling through the Employee Assistance Provider;
- Support services provided through initiatives such as Workable NI or Condition Management Programmes; and
- Routine or public cancer screening appointments,

will not count towards the annual allocation of six appointments.

Additional paid time off may be approved by the line manager where appropriate. Managers should consider requests sensitively and adopt a supportive and practical approach.

22.3 Fertility Treatment Appointments

Paid time off for appointments relating to fertility treatment will be approved, subject to compliance with the notification requirements set out in this procedure. These appointments will not count towards the annual allocation of six appointments.

Except for the first appointment, employees may be asked to provide evidence of appointments.

22.4 Ante-Natal Appointments

Pregnant employees are entitled to reasonable paid time off to attend ante-natal appointments.

Except for the first appointment, employees may be asked to provide evidence of appointments. Ante-natal appointments will not count towards the annual allocation of six appointments.

22.5 Gender Reassignment Appointments

Paid time off for appointments relating to gender reassignment will be approved and will not count towards the annual allocation of six appointments.

Requests should be managed in accordance with the arrangements set out in this section. Any absence relating to surgery, treatment or recovery will be recorded as sickness absence.

22.6 Medically Non-Essential Elective Surgery

Paid time off to attend appointments associated with medically non-essential elective surgery will not normally be granted. Employees should use annual leave, TOIL, Flexi Leave or other approved leave arrangements as appropriate.

Where an employee is medically unfit for work following surgery, any resulting absence will be managed in accordance with the Managing Attendance Procedure and normal sickness absence reporting requirements.

22.7 Non-Compliance

Failure to comply with the requirements of this section may result in action being taken under the Disciplinary Policy and Procedure.

23. Reporting of Accidents, Injuries, Diseases and Dangerous Occurrences

Where sickness absence arises from a work-related accident, injury, disease, incident or dangerous occurrence, the absence must be reported and managed in accordance with normal absence reporting procedures. Any required accident or incident documentation must also be completed in accordance with the Health and Safety Policy and Procedure.

Where the absence exceeds seven calendar days, it must be supported by an appropriate Fit Note.

Health issues that raise wider health and safety concerns may also be addressed under PBNI's Health and Safety Policy and Procedures.

Each case involving a work-related accident, injury, disease or dangerous occurrence will be considered on its individual circumstances. Line managers should seek advice from HR and the Health and Safety Department as required and are responsible for ensuring that all

accident and incident reports are completed and submitted in accordance with relevant procedures.

Employees diagnosed with a notifiable infectious disease must obtain appropriate medical clearance before returning to work where this is required by relevant public health guidance or medical advice.

Where an employee has been advised by the Director of Public Health, the Public Health Agency, or another appropriate public health authority not to attend the workplace due to contact with an infectious disease, they must notify their line manager and comply with the advice provided.

Employees who are required to remain away from work because of contact with an infectious disease will have their absence managed in accordance with organisational provisions relating to special leave, sickness absence and any applicable public health requirements.

Employees who have been in close contact with a person diagnosed with an infectious disease that may present a workplace risk must inform their line manager. Appropriate temporary workplace adjustments may be considered, including alternative working arrangements or temporary relocation where necessary to protect employees who may be at increased risk, including pregnant employees.