

Case Conference Guidance Notes

The purpose of a case conference is to agree the actions required to support the employee back to work following sickness absence and/or to address work related issues (including disability) which require collective discussion/actions. During this meeting no clinical details pertaining to the employee will be discussed.

Before a case conference is requested, we would urge managers to request clarification on the advice given within a medical report via email in the first instance. At times there may be conflicts between the report outcomes, the employee's opinion and the needs of the service which need to be addressed, these can often be resolved with a meeting with Manager and HRA.

A case conference should only be requested where an employee has been seen within the previous 3 months and medical advice has been received.

Process

- A referral to Occupational Health should be submitted in the usual way with all relevant information and requesting the case conference.
- Occupational Health will book an appointment for the employee with the practitioner before the case conference and co-ordinate attendance to the case conference.
- Following the employee's review appointment with the practitioner, the case conference will then proceed. The appointment type (MS Teams/ Face to Face) will be based on medical triage of the referral.
- Following the case conference, and with the employees' consent, the medical report based on this appointment will be forwarded in the usual way to the employee, manager and HR.

Attendees to the case conference will typically include:

- Employee
- The relevant line manager/Head of School/Head of Service
- Human Resources (HR) Advisor
- Occupational Health Practitioner
- Employee representative (if required – this would be a colleague or union representative)

The meeting will usually address:

- Occupational Health recommendations (where applicable)
- Phased return to work programme requirements (where applicable)
- Workplace adjustments and/or restrictions (where applicable)
- Key actions required to support the employee at work.

Line Managers will lead the discussion taking notes of the meeting.

An open discussion will be held to clarify the actions required to enable the employee's sustained return to work or to ensure work related issues are addressed.

In order to facilitate discussions or actions, it may be necessary to refer to HR policies and procedures or other reference guides such as:

- [Sickness Absence Policy](#)
- [Capability Policy](#)

The case conference form template on the page overleaf can be used by managers to document notes and discussions from the meeting. Following the meeting, managers should forward copies of the Case Conference Template Form or notes in their own format to the employee, the manager and Human Resources to ensure a common understanding of any actions required.