



This guidance helps you to develop and agree a wellness plan with your line manager that enables you to stay well at work, supports you in managing sustainable attendance, and if you are absent, helps you return to work in a safe and sustainable way.



## WHEN DO I NEED A WELLNESS PLAN?

A wellness plan provides a framework to support you in work, or back to work. Putting a plan together will help to determine the root cause of your absence or health challenge and give you time to collaborate with your line manager to agree actions to make sure you've both done **everything that could reasonably be expected** to help you get back to work or reach a sustainable and acceptable level of attendance.

It needn't be complicated, a wellness plan is simply a written record of the actions you and your line manager have mutually agreed to support you. Here's a link to our guidance on ["when to keep a record"](#)

You and your line manager **can agree a plan at any time** however, there are some common situations where a wellness plan can help you back to work or in work;

- When there's lots happening and you're finding your resilience is being tested
- Where you've had short, regular absences and you and your line manager need to establish whether there is an underlying cause and agree acceptable levels of attendance
- If you have a chronic or long-term medical condition and you and line manager have established adjustments that can be made to help you at work
- If you're returning to work after a longer period of absence and you and line manager have established actions to help facilitate your return to work in a safe and sustainable way
- If you have a disability and you and your line manager have agreed actions that ensure you can attend work safely and with the right support.

**There will a number of other situations where a plan may help you.**

## WHY DO I NEED A WELLNESS PLAN?

**There are reasons why a wellness plan may support you:**

- 1. We have a duty of care and a legal responsibility to support your wellbeing at work.** Agreeing a wellness plan allows you and your line manager to revisit the support and conversations you've had so far and to decide whether there are actions and avenues of support that could be explored or provided. The plan will give you both an opportunity to reflect, document and agree the actions that will support you.
- 2. A wellness plan provides a structure, with an agreed period of review,** enabling you and your line manager to decide when you'll next review the plan, discuss the progress, what's working, any reasonable changes to the plan to support you.
- 3. You'll also start to discuss the "what if"....** The purpose of the wellness plan is to help you reach a sustainable and safe level of attendance at work. If there comes a point where you are unable to return to work, or sustain a reasonable level of attendance, the plan will also incorporate discussions about what happens next.

## KEEP TALKING

The wellness plan is only as good as the quality of the conversation you have. Be open and honest about the support you need, this will help to ensure your mutually agreed plan is tailored to you.



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## HOW TO PREPARE FOR A DISCUSSION

Have a look at the questions below and have a think about what you want to share with your line manager. The list below isn't exhaustive, but might help prompt some thoughts.

- What supports your wellness at work?
- What affects or aggravates your wellness at work?
- What would keep you well at work?
- What support do you need for a specific health problem?
- What has worked (or hasn't worked) well in past?
- Think about anything you can proactively implement to support your health and wellbeing?
- What existing support or reasonable adjustments are working and is there anything else that might help you further?
- What are the early warning signs or triggers of poor health that your line manager can look out for?
- How might your condition affect you at work (if at all)?
- What steps will you take to manage your wellness at work?
- What additional support do you need to help you at work?
- What prognosis do you have for the future? How might that change any of this?

## WHAT SUPPORT CAN I ACCESS TO HELP ME SHAPE MY WELLNESS PLAN?

- If you're a member, your union representative is a great source of support. They are trained and have lots of experience in supporting colleagues with health and wellbeing challenges. They can offer an objective view both before and after your meeting with your line manager and might be able to suggest some approaches you hadn't thought of to help you shape your plan.
- Friends and family know you well and will understand the challenges you've been facing with your health. Talking to them about any changes you're thinking about can help.
- The Employee Assistance Programme can give you guidance on the support available. EAP can also help you prepare for your meeting. You can contact them on 0800 9700 100

## WHAT CAN I EXPECT FROM MY LINE MANAGER?

- Confidentiality
- Constructive, collaborative and sensitive conversation
- Help in explaining the steps involved
- Help to structure the conversation about your wellness plan
- Help with identifying and considering reasonable adjustments and sources of support that you've not yet tried.
- Help to ensure that if you're returning to work after absence that you are appropriately supported

## WHAT IF WE DON'T AGREE?

If you think that you're not being managed fairly or you disagree with your line manager about what should be in your wellness plan then you have options.

- If you can, talk about your concerns with your line manager to try and bridge the gap and agree on a way forward.
- You can talk to your union representative. Your union can offer objective support and guidance to help you reach a good outcome.
- You can raise an [HR Enquiry](#) in Workday. This will enable you to access objective support through issue resolution or mediation. A mediator's role is to help people have constructive discussion in an informal, safe and confidential environment. Mediators encourage participants to work together to find a solution.

Different people and different situations will need different actions. Wellness plans will vary in content, complexity and length, but broadly a good plan will consider the following areas.



## WHERE ARE WE



### WHAT

### WHY

An outline of your medical condition (if you have a diagnosis)

Medical conditions can change over time, a recap will ensure you're starting with the same understanding.

A recap on the reasons for your absence, patterns, and dates

You should have an agreed understanding of the reasons, patterns and dates of any absence. This may also reveal links or triggers for absences or point to a root cause.

A review of influential dates around key absences

Particularly with short-term absence, reviewing key dates may identify work-related or personal triggers for the absence. This might help you identify actions that alleviate future absence.

A review of current medical information/Occupational Health reports

To make sure the information is still relevant and determine whether more up to date or new information is needed to inform future actions.

Discuss support and adjustments implemented so far

Discussing what adjustments are working and what aren't can help you to refine your wellness plan.

## WHAT CAN BE REASONABLY IMPLEMENTED TO SUPPORT YOU?

You may have discussed many of these areas informally, but if you haven't make sure you cover the following topics



### WHAT

### WHY

Review and agree if there are any further adjustments or additional support that can be incorporated into your wellness plan

Take a look at the [Reasonable Adjustments](#) guidance. There are a number of options which you can consider depending on what has been considered previously.

- Physical adjustments to support a physical condition
- Non-physical adjustments might include a change of working pattern or hours (either temporarily or permanently), or minor actions, such as rest breaks, time for medical appointments, cutting back on travel. You may consider temporary or permanent adaptations to job tasks, more training,
- You may discuss redeployment if medical information suggests your job isn't conducive to your long term recovery and wellbeing.

Review whether up to date medical reports might be needed

Up to date medical information will help you and your line manager think about the right adjustments.

Explore specific issues (personal or work-related)

Is there something you need help resolving? Do you need support to help you with a recent change in circumstances or in managing a relationship at work?

Partnership with your line manager

Do you need additional time with your line manager during your plan to check-in on progress, or to support you day to day with your job?

Discuss and agree actions

Your plan should state what actions you and your line manager have agreed, who is going to own the action and when the action will be implemented by.

Discuss and agree responsibilities

Make sure you understand what you're responsible for, what your line manager is responsible for and what you'll do together to get the best outcomes.

Agree the length of the plan

Talk about how long it will take to implement the actions you've agreed. You should also agree what is reasonable in terms of the length of time it will take to embed the adjustment(s), this will inform when you next meet.

Agree when to next get together

You should agree a date for the check-in meeting to review how things are going.