



HR Toolkits

Our brand new HR Toolkits are just one of the many benefits exclusively available to members of the HR Inner Circle.

Long Term Sickness Absence Toolkit

Long term sickness absence can be challenging for both employees and employers. Supporting individuals through extended periods of ill health requires sensitivity, clear communication and effective management. Getting it right helps employees feel valued, aids recovery and can make the potential return to work more successful.

Employers must ensure to manage sickness absence fairly, reasonably and with appropriate adjustments where needed. A proactive and compassionate approach reduces risk, supports wellbeing and helps maintain trust and engagement across the workforce. After all, the aim should be to get the employee back to work.

In this toolkit:

1. Long-term sickness absence policy

Sets out the organisation's approach to managing and supporting employees on long-term sickness absence.

2. Auditing your absence policy

A practical guide to reviewing and ensuring your absence policy remains legally compliant and effective.

3. Long-term sickness absence checklist

A step-by-step reference guide to ensure key stages of the process are followed consistently.

4. Letter inviting to initial absence review meeting

Template letter inviting an employee to an initial absence review discussion.

5. Letter to employee asking for consent to contact doctor

Template letter seeking employee consent to obtain a medical report from their GP or specialist.

6. Letter to employee asking for consent to contact occupational health

Template letter requesting permission to refer the employee for an occupational health assessment.

7. Letter to employee's doctor requesting report

Formal request to the employee's GP or specialist for a medical report under AMRA.

8. Letter to occupational health requesting report

Template letter referring the employee for an occupational health assessment.

9. AMRA consent form

A standard consent form enabling the employer to obtain medical information in line with legislation.

10. AMRA – summary of rights

Explains the employee's legal rights when a medical report is requested.

11. Invitation to welfare meeting

Template letter inviting an employee to a supportive welfare meeting to discuss their health and next steps.

12. Welfare meeting script

A structured script to guide managers through a welfare meeting.

13. Invitation to final absence review

Template letter inviting the employee to a final absence review meeting.

14. Handling a final long-term absence meeting

Guidance for managers on running a final absence review fairly and sensitively.

15. Absence meeting script

A structured script to support consistent and lawful management of absence meetings.

16. Confirmation that company sick pay has been exhausted

Template letter confirming that the employee's company sick pay entitlement has ended.

17. Confirmation that SSP is ending

Template letter notifying the employee of the date their statutory sick pay will cease.

18. Confirmation of dismissal on grounds of ill health

Template letter confirming the termination of employment following due process.

19. Notice pay while on sick leave flowchart

Visual guide to determining whether notice pay is due during sickness absence.

20. Invitation to appeal hearing

Template letter inviting the employee to an appeal hearing following dismissal.

21. Outcome of appeal hearing

Letter confirming the outcome of an appeal hearing and the next steps.

Further resources:

1. List of Recommended Occupational Health Providers
2. Managing Sickness Absence book
3. Inner Circular Article – *How long is long enough to justify dismissal in long-term sickness cases?*
4. Q&A Session – *An employee has been off sick for 2 months and is refusing to have check in meetings via Zoom. She is saying she'll be back on the date that coincidentally match when her full sick pay ends. What can we do?*

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Performance Management Toolkit

Performance management is the process of supporting people to do their best work. It's about setting clear expectations, providing regular feedback, and creating a culture of accountability and growth. Good performance management helps individuals succeed, drives team effectiveness, and ensures business objectives are met.

An effective performance management process provides a clear framework to operate within – reducing the risk of unfair dismissal claims if the performance management process ultimately ends in a dismissal.

In this toolkit:

1. Performance Improvement Plan

A structured plan setting out required performance improvements, support measures, and review timelines.

2. Performance Improvement Plan – Review Meeting Notes

Template for recording discussions and progress against the agreed improvement plan.

3. Top Tips for Managers Running a Performance Improvement Plan

Practical guidance to help managers conduct PIPs fairly, lawfully, and effectively.

4. Performance Management Observation Note

Record for managers to document observed behaviours or performance issues factually and objectively.

5. Performance Management Flowchart

Visual overview of the stages of the performance management process from initial concerns to final outcome, linked to the letters below.

6. Performance Review – Invitation to Stage 1 Meeting (PM1)

Letter inviting the employee to the first formal performance review meeting.

7. Performance Review – Stage 1 Outcome Letter (PM2)

Letter confirming the outcome of the Stage 1 performance review and any next steps.

8. Performance Review – Invitation to Stage 2 Meeting (PM3)

Letter inviting the employee to attend the second formal review meeting.

9. Performance Review – Stage 2 Outcome Letter (PM4)

Letter confirming the outcome of the Stage 2 review, including any continued monitoring or escalation.

10. Performance Review – Invitation to Final Meeting (PM5)

Letter inviting the employee to a final performance review meeting prior to any potential dismissal.

11. Performance Review – Final Outcome Letter (PM6)

Letter confirming the final decision, which may include dismissal or a number of alternative outcomes.

12. Letter to Employee Requesting Medical Report

Formal request seeking the employee's consent to obtain a medical report to inform performance management decisions.

13. Letter to Employee's Doctor Requesting Medical Report

Template for requesting a medical report directly from the employee's GP or specialist under AMRA.

14. Letter to Employee Requesting Occupational Health Report

Letter requesting the employee's consent to refer them for an Occupational Health assessment.

15. Letter to Occupational Health Requesting Medical Report

Letter referring an employee to Occupational Health for assessment and advice.

16. List of Questions for Employee's Doctor/Occupational Health

Sample questions to help get the right answers from medical professionals when assessing fitness and work-related factors.

17. AMRA – Summary of Rights

Summary of the employee's statutory rights under the Access to Medical Reports Act 1988.

18. AMRA Consent Form

Standard consent form enabling the employer to request a medical report in line with legislation.

19. AMRA Consent Form – Occupational Health

Consent form specific to obtaining medical information via Occupational Health.

Further resources:

1. List of Recommended Occupational Health Providers
2. Audio Seminar – *Managing Poor Performance*
3. Annual Conference Recording – *Performance Chemistry (with Celynn Morin)*
4. Annual Conference Recording – *Peak Performance Productivity (with Michael Tipper)*
5. Annual Conference Recording – *Performance Reviews: Less is More (with Mike Clyne)*
6. Inner Circular Article – *A few of our managers have shared that they feel stuck in a loop. They're having the same performance conversations, but nothing seems to shift. It's starting to wear them down. How can I help them stay resilient and hopeful, even when change feels slow or repetitive?*
7. Inner Circular Article – *Probation: Getting the Balance Right for Everyone*

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Appraisal Toolkit

This toolkit provides managers and employees with the resources, templates, and guidance needed to run effective, consistent and fair performance appraisals. It covers the full appraisal cycle, from preparation and meeting structure through to follow-up and record-keeping, ensuring the process supports both individual development and organisational objectives.

In this toolkit:

1. Manager Guidance

A comprehensive guide for managers on conducting fair and effective appraisals.

2. Manager Preparation Checklist

A step-by-step list to help managers prepare thoroughly for an appraisal meeting.

3. Employee Self-Assessment Form

A form for employees to complete in advance of the appraisal meeting, to reflect on their achievements, challenges and goals.

4. Appraisal Meeting Agenda

A suggested meeting structure with timings and discussion prompts.

5. Performance Ratings Guide

Clear definitions for each performance rating to ensure consistent assessment.

6. Appraisal Forms (blank)

The standard form for recording appraisal discussions, ratings, objectives, and development plans. Two different versions for office and manual workers.

7. Appraisal Form (example)

A realistic, anonymised example showing good practice in appraisal documentation.

8. SMART Objectives Writing Guide

Practical tips and examples for creating effective SMART objectives.

9. SMART Objectives Template

A table-based tool for setting clear, measurable, and achievable objectives.

10. Personal Development Plan (PDP)

A template for recording agreed development goals, actions, and timelines.

11. Mid-Year Review Form

A progress review template to check achievements and update objectives mid-cycle.

12. Sample Questions for Managers

A collection of open-ended questions to prompt discussion and reflection during appraisals.

13. Competency Based Pay Progression Framework

Template outline for how employee pay progression is linked to demonstrated competencies and performance levels.

14. Competency Framework Checklist

A practical tool to help managers assess and evidence employee competencies consistently during appraisals.

Further resources:

1. Blog Article – *Fair or Flawed? Making Performance Appraisals Legally Defensible*
2. Q&A Session – *Is it mandatory for an employer to give appraisal and development feedback to an employee?*

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Stress at Work Toolkit

Stress at work is a common experience, but when it becomes excessive or prolonged it can have a serious impact on health, wellbeing and performance. Managing stress is not only about supporting individuals but also about creating a healthy workplace culture where employees can thrive.

Employers have a legal responsibility under employment and health & safety law to identify, reduce and manage risks linked to work-related stress. Taking proactive steps helps protect employee wellbeing, reduce absence, and improve engagement and productivity.

In this toolkit:

1. Stress at Work Policy

Sets out the organisation's commitment to preventing and managing work-related stress and promoting employee wellbeing.

2. Stress Risk Assessment

A practical template for identifying, evaluating, and controlling stress-related risks in the workplace.

3. Employee Stress Self-Assessment Form

A tool to help employees reflect on their wellbeing, identify stress triggers, and guide supportive workplace discussions.

4. Managers Guide to Spotting the Signs of Stress at Work

Guidance to help managers recognise early indicators of stress and respond appropriately.

5. Checklist: Spotting and Responding to Signs of Stress

A quick-reference checklist for managers to assess potential stress factors and take supportive action.

6. Stress Incident Log

A record-keeping tool to document reported stress-related incidents and the actions taken.

7. Stress Concern Notification Form

A form for employees or managers to raise concerns about work-related stress confidentially and constructively.

Further resources:

1. Preventing and Defending Employee Stress Claims book
2. Audio Seminar – *Stress at Work*
3. Top 10 Questions About Grievances Webinar – *How should you deal with a grievance raised by an employee who is off sick due to stress?*
4. Q&A Session – *How should an employer handle an employee who went off sick with work-related stress immediately after being taken on permanently and is unresponsive to meeting requests?*
5. Health and Safety Executive (HSE) Management Standards for Work-Related Stress. Authoritative UK guidance, assessment tools and case studies:
6. Mental Health First Aid England – training courses, manager toolkits and refreshed guidance on peer support.

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