Return-to-work form

Private and confidential. This form holds health information: keep it with your restricted HR records, not the general staff file.

1. Person and conversation

Name: *[name]* | Job title: *[role]*
Held by: *[name and role]* | Date of conversation: *[date]*
Anyone else present, with the person's agreement: *[name and role / none]*

2. Absence dates

First day off: *[date]* | Last day off: *[date]* | Back at work: *[date]*
Total absence: *[number]* working days, *[number]* calendar days
Another sickness absence in the 8 weeks before this one: *[no / yes: dates]* (payroll uses this for Statutory Sick Pay)

3. Reason for absence

Type: *[sickness / injury / other]*
In the person's own words: *[only what they choose to share]*
If it was an injury at work: *[accident record reference and date]*
Note: The person does not have to share medical details. Record what they say, not a diagnosis.

4. Self-certification or fit note

First 7 calendar days: self-certified on *[date]* by *[form or route]*
After 7 calendar days: fit note received *[yes / no]* | Dates it covers: *[from / to]*
The fit note says: *[not fit for work / may be fit for work]*
If "may be fit for work", it suggests: *[phased return / altered hours / amended duties / workplace adaptations]*
Its comments, in brief: *[details]*
What you agreed about that advice, and why: *[details]*
Note: Fit-note advice is advice, not an instruction; discuss it together. If you can't make the changes it suggests, treat it as saying not fit for work. The person can come back before the fit note ends, and there is no "fit to return" note to wait for.

5. Fitness for work

Well enough for their normal duties: *[yes / yes, with the changes below / not yet: next step]*
Linked to an ongoing or long-term condition: *[no / yes / not sure]*
If yes or not sure: consider the duty to make reasonable adjustments (the Equality Act 2010 in Great Britain, the Disability Discrimination Act 1995 in Northern Ireland), and whether occupational health advice or Access to Work could help.
Did anything at work cause or add to the absence: *[no / yes: what, and the action agreed]*
Note: If they mention work-related stress, review the stress risk assessment for their role.

6. While they were away

Changes to share (people, work, systems, rotas or policies): *[details]*
Work that was covered, and what happens to it now: *[details]*
What colleagues will be told, as the person wishes: *[details / nothing]*

7. Adjustments and phased return

Adjustments agreed: *[each change, who makes it and by when]*
Phased return: *[not needed / yes, from [date] to [date]]*

Pay during the phased return: *[how any hours not worked are paid, confirmed in writing]*

Week	Dates	Days and hours	Duties	Pay	Check-in
1	*[from / to]*	*[days, hours]*	*[duties]*	*[pay]*	*[date]*
2	*[from / to]*	*[days, hours]*	*[duties]*	*[pay]*	*[date]*
3	*[from / to]*	*[days, hours]*	*[duties]*	*[pay]*	*[date]*
4	*[from / to]*	*[days, hours]*	*[duties]*	*[pay]*	*[date]*

Note: Agree the length together, review it as you go and extend it if needed. On reduced hours the person is paid for the hours they work; your policy or agreement covers the rest. Statutory Sick Pay only covers whole days not worked.

8. Support and follow-up

Support agreed: *[for example check-ins, an occupational health referral or an employee assistance programme]*
Sick pay checked with payroll: *[Statutory Sick Pay / company sick pay / none]* by *[name]* on *[date]*
Review date: *[date]* | Follow-up owner: *[name and role]*

9. Signatures

Signed by	Name	Signature	Date
Employee			
Manager			

Employee's comments, if any: *[details]*
Signing confirms this is a fair record of the conversation. It is not agreement to any later decision.

10. Keeping this form

Keep it as special category (health) data. You need a lawful basis and a special category condition, usually the employment condition, which also needs an appropriate policy document. Only the person, HR and anyone with a clear need may see it. Store it securely, set a retention period, delete it when that ends and explain it in your privacy notice.
Guidance and sources: https://www.hollyhr.com/templates/return-to-work-form-template