

Phased return to work plan template

A phased return brings someone back on reduced hours or duties, building up over an agreed period - typically four to six weeks. It's one of the four things a fit note can suggest, and the single most effective way to stop a return from failing in week two. The full plan template is below.

What is a phased return to work?

A structured, time-limited arrangement where someone returns on less than their normal hours or duties and steps up to full capacity over a few weeks. It's suggested on the fit note by ticking "may be fit for work" - see the fit note employer guide - and agreed between the employee, their manager and, where involved, occupational health.

Pay during a phased return is a policy decision: many employers pay in full for the phase (it's usually short and it protects the return), others pay for hours worked with sick pay covering the balance where entitlement remains. Whatever you choose, say it in the plan so nobody discovers it on payday.

The phased return plan template

Copy everything from here to the end of section 5, and replace each [bracketed placeholder].

1. The basics

- Name: [] Role: [] Manager: []
- Last day of absence: [] First day back: []
- Fit note dated [], valid to [] Suggestions ticked: []
- Plan agreed by: [employee] and [manager] on [date]
- Review date: [] (before the plan ends, not after)

2. The build-up

- Week 1: [] hours over [] days - duties: []
- Week 2: [] hours over [] days - duties: []
- Week 3: [] hours over [] days - duties: []
- Week 4: [] hours over [] days - duties: []
- Full duties and hours resume: [date]

3. Adjustments during the phase

- Duties paused or reallocated: [] Reallocated to: []
- Changes to hours or start/finish times: []
- Equipment, workspace or access changes: []
- Meetings, travel or on-call excluded for now: []
- Are any of these reasonable adjustments that should continue permanently? []

4. Support and check-ins

- Check-in with manager: [weekly, day/time]
- Who else knows, and what they've been told: [] (the employee decides how much is shared)
- Occupational health involved? [] Next appointment: []
- Employee assistance / other support offered: []
- What to do if things get harder again: [named person and route]

5. Pay and record

- Pay during the phase: [full pay / hours worked plus sick pay for the balance / other]
- How the absence is recorded during the phase: []
- Holiday accrued during the absence to be used or carried: [] (it keeps accruing - see the guide below)
- Copy stored on the absence record by: [] on [date]

A worked four-week example

- Week - Days - Hours - Duties
- 1 - 3 - ~15 - core tasks only, no meetings, no travel
- 2 - 3 - ~21 - core tasks, one team meeting
- 3 - 4 - ~28 - most duties, no on-call
- 4 - 5 - ~34 - full duties, review before week 5

How to adapt the plan

- Let the person shape it. They know which parts of the job cost them most energy - a plan built with them is a plan that survives contact with a real week.
- Front-load the recovery, don't back-load it. Three short days in week one beats five long ones followed by a relapse.
- Review before the end, not after. If week three is a struggle, extending is easy; discovering it in week five isn't.
- Separate the temporary from the permanent. If an adjustment is working and the underlying condition is a disability, it may need to become permanent under the Equality Act.
- Don't let it drift indefinitely. An open-ended phase helps nobody - if full duties aren't realistic, that's a capability conversation held kindly: capability vs conduct.

A free template from CoDash - codash.co.uk/templates. Edit it to match how your company actually works, and take advice on anything unusual.