

Priya Kapoor
Finance Analyst
Employer HR file

Date: 14 July 2026
Our Reference: LTSC/2C199C15
Document Type: Checklist

Long-Term Sickness Review Checklist

1. EXECUTIVE SUMMARY

This checklist supports the ongoing management of Priya Kapoor's long-term sickness absence following the review held on 2 April 2025.

Key topics covered include Occupational Health recommendations, current medical certification, outstanding tasks, phased return considerations, and temporary work coverage arrangements.

The next follow-up review is scheduled for 30 April 2025 to monitor progress and assess further support needs.

The checklist ensures compliance with good practice by focusing on support, communication, and practical management steps, without including detailed medical information.

Employers are reminded to verify the completeness of required information and confirm evidence before finalising this file.

CHECKLIST DETAILS

Employee
Priya Kapoor

Role
Finance Analyst

Case type
Manage Long-Term Sickness

Reference
HRA-2C199C15

KEY DATES

Completed
14 July 2026

First review
02 April 2025

SUPPORT NOTE

Keep the record factual, avoid unnecessary medical detail and review any support or workplace adjustment actions with the employee.

Continued

Long-Term Sickness Review Checklist

2.

 TASKS AND ACTIONS

- Review the recorded facts of the long-term sickness review meeting for completeness and accuracy.
- Confirm progress against Occupational Health recommendations and current medical certifications.
- Assess the feasibility and planning of a phased return to work at 60% capacity, including necessary adjustments such as reduced screen time and minimized meeting attendance.
- Arrange temporary cover for Priya’s outstanding month-end finance tasks to maintain business continuity.
- Schedule and prepare for the follow-up review on 30 April 2025 to reassess Priya's health status and work readiness.
- Examine uploaded evidence manually as the metadata-only evidence cannot be considered fully reviewed.
- Ensure clear ownership of follow-up actions and documentation are assigned to relevant HR or line manager representatives.
- Update Priya’s personnel record with all finalised documentation after approval and review.

Evidence Log

Evidence Item	Source	Date	Relevance	Reviewed By
long-term-absence-record	Synthetic Sample Reviewer	14 July 2026	Synthetic fixture evidence for sample generation.	Synthetic Sample Reviewer

Follow-up Action Plan

Action	Owner	Due Date	Evidence Required	Status
Review the long-term sickness review record and confirm it reflects the agreed facts.	HR	02 April 2025	Completion note or supporting evidence	Open
Long-Term Sickness Review Follow-up is due on 30 April 2025.	HR	02 April 2025	Completion note or supporting evidence	Open
Record a clear owner and review point for the long-term sickness review outcome.	HR	02 April 2025	Completion note or supporting evidence	Open
Review the Manage Long-Term Sickness record for missing facts, evidence, follow-up ownership or review safeguards before completion.	HR	02 April 2025	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	HR	02 April 2025	Completion note or supporting evidence	Open
File the final documents in the employee's personnel record.	HR	02 April 2025	Completion note or supporting evidence	Open

Continued

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3. CHECKLIST: LONG-TERM SICKNESS MANAGEMENT TASKS

Task: Review long-term sickness meeting facts and confirm accuracy.

Owner: HR Manager / Line Manager

Priority: High

Due date: Immediate

Evidence required: Meeting notes from 2 April 2025; Occupational Health reports; medical certificates.

Status: Pending

Completion notes:

4. CHECKLIST: CONFIRM OCCUPATIONAL HEALTH RECOMMENDATIONS AND MEDICAL CERTIFICATION

Task: Verify latest OH advice and current medical certification status.

Owner: HR Manager

Priority: High

Due date: Immediate

Evidence required: Occupational Health report, employee's medical certificates.

Status: Pending

Completion notes:

Continued

Long-Term Sickness Review Checklist

5. CHECKLIST: PLAN AND FACILITATE PHASED RETURN TO WORK

Task: Agree phased return plan at 60% capacity with screen-time and meeting adjustments.

Owner: Line Manager / HR

Priority: Medium

Due date: Before next review on 30 April 2025

Evidence required: Phased return agreement documentation, communication with employee.

Status: Pending

Completion notes:

6. CHECKLIST: ARRANGE TEMPORARY COVERAGE FOR KEY TASKS

Task: Ensure cover is in place for Priya's month-end finance responsibilities.

Owner: Finance Team Lead

Priority: Medium

Due date: Immediate

Evidence required: Temporary work delegation records, team communications.

Status: Pending

Completion notes:

Continued

Long-Term Sickness Review Checklist

7. CHECKLIST: SCHEDULE AND CONDUCT FOLLOW-UP REVIEW

Task: Conduct follow-up review to assess progress and ongoing support needs.

Owner: HR Manager / Line Manager

Priority: High

Due date: 30 April 2025

Evidence required: Follow-up review notes and updated medical information.

Status: Overdue

Completion notes: Review overdue, please prioritise.

8. CHECKLIST: REVIEW AND FILE DOCUMENTATION

Task: Review all documents for factual accuracy and completeness prior to filing.

Owner: HR Manager

Priority: High

Due date: Following finalisation of follow-up review

Evidence required: Reviewed meeting notes, signed agreements, correspondence.

Status: Pending

Completion notes:

Continued

Long-Term Sickness Review Checklist

9. MANDATORY SAFEGUARDS AND NOTES

Only the information provided by the employer has been used; no assumptions have been made regarding medical conditions or other sensitive details.

Medical details are limited to those necessary for supporting adjustments and phased return considerations.

The employer must manually review all uploaded evidence as some items contain metadata only and cannot be fully verified here.

Responsibility for verifying facts, ensuring policy compliance, and legal risk assessment remains with the employer.

Consistent, empathetic communication with Priya throughout this process is essential to support her welfare and facilitate a successful return to work.