

Ethan Cole
Finance Business Partner
Employer HR file

Date: 14 July 2026
Our Reference: FNR/D075D249
Document Type: Checklist

Fit Note Reminder for Sickness Absence Case

1. TASK

Confirm receipt and condition of employee's fit note or request submission if pending.

Maintain fortnightly contact with Ethan Cole to monitor wellbeing and recovery progress.

Coordinate review of ongoing task allocations and impact on audit timetable due to absence.

Schedule and prepare for return-to-work meeting upon employee's return or earlier if appropriate.

Follow up on fit note evidence by 14 April 2026 to ensure current documentation is complete.

Assess suitability and implementation of temporary adjustments including reduced hours, remote admin on Fridays, and suspension of client site visits.

Support and document any occupational health referrals to plan phased return and reasonable adjustments.

Update all relevant stakeholders including finance team, management, and partners regarding absence status and contingency arrangements.

Follow-up Action Plan



CHECKLIST DETAILS

Employee
Ethan Cole

Role
Finance Business Partner

Case type
Sickness Absence Case

Reference
HRA-D075D249



KEY DATES

Completed
14 July 2026

Owner
Sofia Grant (acting operational owner); HR support by internal lead



SUPPORT NOTE

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

Action	Owner	Due Date	Evidence Required	Status
Review the return to work form and confirm it reflects the agreed facts.	Sofia Grant (acting operational owner); HR support by internal lead	To be confirmed	Completion note or supporting evidence	Open
Review the fit note reminder and confirm it reflects the agreed facts.	Sofia Grant (acting operational owner); HR support by internal lead	To be confirmed	Completion note or supporting evidence	Open
Fit Note Due is due on 21 July 2026.	Sofia Grant (acting operational owner); HR support by internal lead	To be confirmed	Completion note or supporting evidence	Open
Request a fit note if absence length requires one.	Sofia Grant (acting operational owner); HR support by internal lead	To be confirmed	Completion note or supporting evidence	Open
Schedule a return-to-work meeting when the employee returns.	Sofia Grant (acting operational owner); HR support by internal lead	To be confirmed	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	Sofia Grant (acting operational owner); HR support by internal lead	To be confirmed	Completion note or supporting evidence	Open

Continued

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2.

 OWNER

- Sofia Grant (acting operational owner) with support from internal HR lead.
- Sofia Grant to lead contact and communication efforts.
- Sofia Grant to review task impacts and liaise with finance team and partners.
- Sofia Grant to arrange and lead return-to-work meeting in conjunction with HR support.
- Sofia Grant responsible for fit note monitoring and follow-up.
- Sofia Grant and HR to coordinate temporary adjustments and support measures.
- Internal HR lead to assist with occupational health referral and phased return planning.
- Sofia Grant to manage communications and updates to all relevant parties.

Evidence Log

Evidence Item	Source	Date	Relevance	Reviewed By
fit-note-synthetic-sample.	Synthetic Sample Reviewer	14 July 2026	Synthetic fixture evidence for sample generation.	Synthetic Sample Reviewer

Continued

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3. PRIORITY

High priority – essential to confirm medical evidence and maintain statutory compliance.

Medium priority – regular engagement supports wellbeing and absence management.

High priority – critical to maintain operational continuity and meet audit deadlines.

High priority – formal step in return to work and absence resolution.

Medium priority – ensures all evidence is current and valid.

Medium priority – aids in employee recovery and operational adjustment.

High priority – important for health and safety and legal compliance.

Medium priority – maintains transparency and operational awareness.

4. DUE DATE

21 July 2026 (fit note due).

Fortnightly check-ins starting immediately, next by 28 March 2026.

Ongoing monitoring with monthly formal review aligned with audit cycles.

Schedule return-to-work meeting upon confirmed return date (expected 21 April 2026).

14 April 2026 for fit note follow-up review.

Implement adjustments as soon as practicable following risk assessment.

As occupational health referral is initiated and reports received.

Ongoing, with updates at least monthly or as situation changes.

Continued

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5. EVIDENCE REQUIRED

Fit note documentation or medical certificates confirming absence and duration.

Log of contact attempts and responses with Ethan Cole.

Records of task reallocation, audit timetable impact notes, and partner meeting minutes.

Return-to-work interview notes and any phased return agreements.

Fit note or updated medical evidence received by 14 April 2026.

Documentation of agreed temporary adjustments and employee consent.

Occupational health referral form and outcome report.

Communication emails or memos to management, finance team, and audit partners.

6. STATUS

Fit note requested and due 21 July 2026.

Ongoing fortnightly contact plan agreed and in progress.

Task reallocation underway; audit timetable impact noted.

Return-to-work meeting to be scheduled post absence.

Fit note follow-up scheduled for 14 April 2026.

Temporary adjustments under consideration, pending assessment.

Occupational health involvement pending referral initiation.

Communication updates ongoing; next review 14 April 2026.

Continued

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7. **COMPLETION NOTES**

- Ensure fit note is reviewed upon receipt for completeness and dates.
- Maintain regular, supportive engagement respecting employee preferences.
- Monitor operational impact; escalate concerns regarding audit deadlines promptly.
- Document return-to-work discussions and agreed arrangements thoroughly.
- Follow up promptly on fit note to maintain compliant records.
- Confirm adjustments meet both operational needs and employee health requirements.
- Ensure occupational health feedback informs return-to-work plan effectively.
- Record all stakeholder communications for transparency and audit trail.

8. **AMENDMENT CONTROL**

Any changes to the facts, decisions, actions, evidence, responsibilities or review dates should be agreed in writing and recorded as an amendment to this document.

Appendix A - Amendment Log

Amendment Date	Section Updated	Previous Position	Updated Position	Approved By