

Amina Yusuf
Customer Support Advisor
Employer HR file

Date: 14 July 2026
Our Reference: FUC/760224A1
Document Type: Checklist

Return-to-Work Meeting Follow-up Checklist for Amina Yusuf

1. RETURN-TO-WORK FOLLOW-UP CHECKLIST

Task: Review and confirm accuracy of return-to-work meeting minutes and ensure Amina Yusuf has a dated copy.

Owner: Tom Brennan (Line Manager)

Priority: High

Due date: 18 May 2026 (prior to meeting)

Evidence required: Signed meeting minutes document; confirmation of employee receipt.

Status: Complete

Completion notes: Meeting held 25 May 2026; minutes prepared and provided to Amina; confirm scanning onto HR file.

Review Schedule

Review	Owner	Due Date	Evidence Required	Status
Initial review	Tom Brennan (Line Manager)	25 May 2026	Review notes	Scheduled
Final review	Tom Brennan (Line Manager)	20 May 2026	Outcome record	Pending

Follow-up Action Plan

 CHECKLIST DETAILS

Employee
Amina Yusuf

Role
Customer Support Advisor

Case type
Return-to-Work Meeting

Reference
HRA-760224A1

 KEY DATES

Completed
14 July 2026

First review
25 May 2026

Final review
20 May 2026

Owner
Tom Brennan (Line Manager)

 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.	Tom Brennan (Line Manager)	25 May 2026	Completion note or supporting evidence	Open
Review the return-to-work summary letter and confirm it reflects the agreed facts.	Tom Brennan (Line Manager)	25 May 2026	Completion note or supporting evidence	Open
Follow-up Review is due on 28 July 2026.	Tom Brennan (Line Manager)	25 May 2026	Completion note or supporting evidence	Open
Complete factual return-to-work meeting notes before closing the action.	Tom Brennan (Line Manager)	25 May 2026	Completion note or supporting evidence	Open
Review the Conduct Return-to-Work Meeting record for missing facts, evidence, follow-up ownership or review safeguards before completion.	Tom Brennan (Line Manager)	25 May 2026	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	Tom Brennan (Line Manager)	25 May 2026	Completion note or supporting evidence	Open

Continued

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2. TEMPORARY WORKPLACE ADJUSTMENTS ARRANGEMENT

Task: Implement agreed temporary adjustments — reduced shift length for two weeks and no lone visits pending review.

Owner: Tom Brennan (Line Manager)

Priority: High

Due date: 26 May 2026 (immediate post-meeting)

Evidence required: Updated rota with adjusted shifts; email confirmation of adjustment communicated to relevant staff; rota coordinator informed if required.

Status: In progress

Completion notes: Informal shift swaps arranged; formalisation in progress.

3. MONITOR EMPLOYEE HEALTH AND SAFETY ON RETURN

Task: Monitor performance, symptoms and safety during adjusted shifts.

Owner: Tom Brennan (Line Manager)

Priority: Medium

Due date: Ongoing until next review 8 June 2026

Evidence required: Shift logs noting any concerns; check-ins or updates from Amina; report any incidents or symptoms noted.

Status: Ongoing

Completion notes: Observations on 20 May noted paleness and slowed responses; plan to observe further.

Continued

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4. EMPLOYEE COMMUNICATION AND SUPPORT

Task: Ensure ongoing open communication with Amina regarding symptoms and wellbeing.

Owner: Tom Brennan (Line Manager)

Priority: Medium

Due date: Continuous until review date

Evidence required: Email or message logs; notes of conversations related to wellbeing or symptoms.

Status: Ongoing

Completion notes: Amina confirmed dizziness on 20 May, anxious about lone work, will consult GP if symptoms continue and provide fit note.

5. MEDICAL EVIDENCE FOLLOW-UP

Task: Request and log any fit note from Amina if symptoms persist or medical advice is received.

Owner: Tom Brennan (Line Manager)

Priority: Medium

Due date: By review meeting on 8 June 2026

Evidence required: Copy of fit note or medical certificate; email confirmation of receipt and filing.

Status: Pending

Completion notes: Awaiting confirmation from employee; reminder to be sent ahead of review if not received.

Continued

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6. REVIEW MEETING PREPARATION

Task: Prepare for follow-up review meeting scheduled for 8 June 2026 to assess adjustment effectiveness and employee readiness.

Owner: Tom Brennan (Line Manager)

Priority: High

Due date: 5 June 2026

Evidence required: Summary report on attendance, health, safety and adjustment impact; notes of any developments since last meeting.

Status: Upcoming

Completion notes: Initial two-week temporary adjustments agreed; review will determine further steps.

7. HR FILE DOCUMENTATION

Task: Ensure all meeting notes, adjustments, communications and evidence are filed correctly on HR file.

Owner: HR Team (if applicable) with oversight from Tom Brennan

Priority: High

Due date: Immediate post-meeting finalisation

Evidence required: Digital copies of documents with version control and dated records.

Status: In progress

Completion notes: Meeting minutes prepared; employer to check documented dates, employee copy distribution, and file updates before closure.

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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