

PROTOCOL FOR CASE CONFERENCE

What is a case conference?

This is a transparent meeting with the purpose of moving a case forward. The case usually involves interpersonal conflict, work related stressors/issues or the need for adjustments to duties. It is intended that the result of the case conference will be an action plan, which is drawn up by the Manager/HR to resolve the situation. This is drawn up utilising the expertise of the Occupational Health professional and HR and the input of the employee.

Criteria for inclusion

- Work related stressors/Issues
- Case progression
- Adjustments to duties - temporary or permanent

Who should be present?

- Employee (TU rep if requested)
- Manager
- OH clinician
- HR

Who should chair the meeting?

- Whoever called the case conference. If following a consultation we think it would be beneficial to call a case conference, we should set up the meeting date, time and venue by inviting all the key players. Our medical report as a result of the consultation should mention the need for a case conference to implement an action plan. If the Manager or HR officer calls a case conference we will need to confirm the reason why and reiterate that the employee should be present.
- If the Manager wishes to call a meeting without the employee, this is not a case conference but a meeting to discuss the employee. As the OH clinicians we are able to attend these meetings to have an understanding of the Managers concerns but we need to make the Manager aware that in order for us to utilise any information that they share with us it has to be factual and transparent and they need to be comfortable with us sharing the information with the employee.

Timescale for Case conference

- As soon as possible after the Consultation
- Duration of case conference should be approximately 1 hour
- The action plan should be written by the Manager/HR and circulated to all key players within 5 working days of the case conference. It will also be the responsibility of the Manager to monitor this.
- The action plan should be implemented immediately
- The OH clinician will determine the appropriate timescale for review of the employee to determine if the action plan has been successful.

Any other important points?

- The OH clinician will only be able to share medical information that the employee has agreed.
- The OH clinician will act from a neutral stand to try and take things forward for the Organisation and the employee.
- The OH clinician will be happy to have a preliminary meeting with the Manager before the case conference if the Manager wishes to express any concerns they may have.
- Alcohol abuse, substance misuse and odd behaviour cannot be tackled unless the Manager is able to substantiate their concerns and give factual information.