



Manager FAQs:

Health and wellbeing check-ins

What is a health and wellbeing check-in:

The [NHS People Plan](#), published in 2020, set out a number of ambitions and promises for all of us who work in the NHS. One such ambition was that:

“Every member of the NHS should have a [health and wellbeing conversation](#) and develop a personalised plan. These conversations may fit within an appraisal, job plan or one-to-one line management discussion, and should be reviewed at least annually.

“As part of this conversation, line managers will be expected to discuss the individual’s health and wellbeing, and any flexible working requirements, as well as equality, diversity and inclusion.”

So a HWB check-in is simply a conversation between a member of staff and their line manager (in most cases). It should look at the wellbeing of the individual; think about what helps them to be healthy inside and outside of work; and assess whether we as an organisation can do anything more to support people to look after their well-being.

Why do we need to have these check-ins?

Ultimately, health and wellbeing check-ins are there to ensure our staff are well, feel supported and have an opportunity to request further support from the Trust if needed.

It’s important that we are aware of any potential issues that individuals may be facing to make sure that we, the organisation, are giving people the right support at the right time. As we lead increasingly busy lives both inside and outside of work, we need to prioritise making time to have these types of conversations so that any issues can be identified early on and the right support put in place.

As well as helping individuals, check-ins will also help the Trust itself. Any themes identified and raised by managers at business unit meetings will be passed on to the Trust’s newly formed Health and Wellbeing Team to help shape the Trust’s health and wellbeing strategy and to inform more effective and targeted support.

What if I already have this type of conversation with my team members regularly?

Great! We completely understand that for many managers, checking-in with staff will already be a regular occurrence, and indeed we would encourage you to continue with this approach. Please try make some time to check-in again between now and the end of July.



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How long will the check-in take?

Ideally we'd ask you to spend about an hour on these conversations, however we also recognise that some HWB Check-ins will be more straightforward than others, and so probably won't take that long.

The important thing is that this is a quality conversation, and that the individual feels supported – whatever that may look like for them.

Accordingly, managers are trusted to use their knowledge of the people within their teams to make a judgement call on what would constitute an effective, quality and useful check-in for every individual.

For some people that might be a quick 10 minute catch-up, for others, a 30 minute chat over a coffee, maybe using time within established 1:1 line management discussions or appraisals, and even holding a MS Teams meeting to enable remote participation.

I haven't got the time to do these – are they mandatory?

Every member of staff must be offered a health and wellbeing check-in. As described above, these can happen as part of normal line management conversations that you're already having, so hopefully this won't be an added time burden.

We understand that not every member of staff may want to take part in this check-in, but all staff must be offered the opportunity to have one.

Are health and wellbeing check-ins here to stay?

Yes. These check-ins should happen at least annually, although we encourage managers to check-in more frequently wherever possible.

Do these check-ins replace appraisals?:

No. You should continue to carry out appraisals as normal. However, you might want to hold a health and wellbeing check-in within an appraisal to aid with managing the time commitment.



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Do I have to use the health and wellbeing check-in activity sheet?

The most important thing is that a quality conversation takes place. The [activity sheet](#) is a useful 'checklist' of things you should be discussing, it's a record of the conversation and also something the individual can then use as a personal wellbeing plan.

So while we won't ask you to send us a copy of the activity sheet, we would recommend you make use of it to frame your conversations.

Should I keep a copy of the activity sheet for my own records?

No. The content of the check-in you have, and any outputs from it, belongs to the individual. No record should be kept on their personal file or your management records.

Will the details of health and wellbeing check-ins be held on an individual's personal file?

No. The content of the conversation you have with an individual belongs to them. No record should be kept on their personal file or on any other management records.

Where an individual declines to have a check-in, we ask you make note of this as the Trust will endeavour to ensure all team members have the opportunity to have a chat.

I don't feel confident in carrying out these check-ins. What help is available to me? Is there any training I can attend?

For some people, this may feel daunting but in reality check-ins are a simple conversation with a purpose – to ensure our people feel supported and know how to access any help they might need.

If you feel that you'd benefit from some support before carrying out these check-ins, there are numerous ways you can access this.

We'll be hosting virtual workshops across dates in June, as well as drop-in Q&A sessions. You can find more details, including dates, times and info, as well as a resource kit of support and signposting, all available via [the dedicated StaffZone health and wellbeing check-in area](#).

Finally, there are also some excellent dedicated national resources available via the NHS England 'Our NHS People' website, available to read and watch [here](#).



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What should I do if someone becomes upset during the check-in:

Hopefully this will be infrequent, but it's useful to think about this in advance as some people may discuss things that are upsetting for them.

It's important to treat each person individually, and to ask what help they would like at this point. They might want to leave the check-in and revisit it at a later date; to have a 10 minute break or to discuss everything there and then.

The most important thing in this situation is that you listen with compassion and empathy, and that you ensure the individual feels okay to return to the workplace.

Don't forget, you can refer to the dedicated support resources we have shared with you to assist in relevant signposting; workshops are also available for those who'd like more clarity and drop-in sessions are available for those with questions.

How do I know what help someone needs?

We don't expect our managers to become experts in any of the specific subject areas which might be discussed. However, you should know how to make a referral to Occupational Health so that the individual can be triaged, and can be referred into the relevant support.

It's also useful for managers to know what support is already available via the health and wellbeing pages on StaffZone, so that you can signpost people to those relevant resources.

My staff member isn't sure if they want help. Do I need to refer them into Occupational Health (or another support mechanism), or can I ask them to refer themselves if/when they are ready?:

If someone isn't sure whether they need help, it might be useful for them to have a conversation with Occupational Health in any case. You can decide between yourselves whether you will make the referral or they will self-refer.

If the individual feels they don't need help at this present time, it's fine to let them think about it and make a decision at a later date. However, you should check in with them again at a later stage to check how they are and see if they need any further support or guidance.



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How do I make a referral into Occupational Health/Counselling/Physiotherapy?

Visit the Occupational Health page on StaffZone and click the [referral page](#). Forms for both management referrals and self-referrals are hosted here.

What if I'm concerned about the immediate safety of my team member?

We all have a duty of care towards the people in our team. Accordingly, if you're concerned about the immediate safety of a team member you should respond as you would in any other circumstance – seeking help from the appropriate person or service.

If you are in any doubt as to who you should seek help from, in the first instance please speak to your own line manager or another senior member of staff.

Alternatively, please contact Occupational Health on 0191 445 5494. This team is available between 08:30am – 5:00pm, Monday to Thursday; and 8:30am – 4:30pm on Fridays.

What if my team member doesn't want to have a health and wellbeing check-in?

Firstly, please don't be offended – it is inevitable that some colleagues will not feel fully comfortable discussing their wellbeing directly with a line manager.

Feel free to continue approaching the subject as and when you feel it may be beneficial to your team member(s) between now and the end of July. If you've still been unable to check-in with them by then, please make a note of their name as the Trust will strive to ensure all have had the chance to have a chat.

What if my team member wants to have their check-in with someone else?

Again, please don't be offended by this. The most positive thing here is that the individual does want to speak to someone about their wellbeing.

If your team member would sooner have this conversation with someone else, please ask them to let us know by emailing ghnt.hwbcheckin@nhs.net.



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How can I encourage participation?

The Trust encourages you to make a judgement on what you feel would be the most effective way to approach a check-in based on each individual. What matters most is not the method of checking-in, but providing quality opportunities for your team members to raise any issues and support needs.

Check-ins are designed to be flexible and can be as informal as you believe necessary and by each individual. Remember, you can also hold a check-in within appraisals and one-to-one line management discussions to aid time management.

What is the expected output of a health and wellbeing check-in?

Ultimately, our aim is to ensure the individual feels well, supported, valued and has the opportunities to raise issues and request further support.

The Trust will equip all managers with the resources to provide effective signposting. Amongst these is a [check-in activity sheet](#) which managers can guide individuals through, helping them to identify areas in which they may need further support or action. This activity sheet can then act as a personalised plan for the individual.

Though it isn't mandatory to use this activity sheet, it may be of particular use to managers and colleagues who would be more comfortable structuring their check-in around an activity. It can then also act as a useful reminder to both the manager and individual around any commitments agreed within the check-in.

Do I need to check what if my team member has done what was identified in their plan? What if they haven't?

Health and wellbeing check-ins are not a one off event, and should happen as part of your day-to-day line management. It is therefore perfectly normal to check back in with the individual, discuss what was agreed previously, check on progress and have a compassionate conversation about why things might not be moving if required.

It is important the individual takes responsibility for their wellbeing, while we (as managers and the organisation as a whole) facilitate this by sharing routes into appropriate help and support.



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Do I need to record anything from a health and wellbeing check-in?

We ask you do not make any record of individual discussions, but it would be helpful for you to think about and record any overarching themes from check-ins with your team. These can then be anonymously discussed at the relevant forums and enable more effective and targeted support from the Trust to its employees.

Is there a time limit for when I need to complete check-ins with my team by?

Yes. The Trust asks line managers to check-in with all team members by the **end of July**. We understand that for many line managers, check-ins will be initiated during times of difficulty or stress for the individual, in more natural circumstances and not in a formal manner.

Accordingly, and while managers are still encouraged to check-in as soon as reasonably possible with staff who they feel would benefit from a check-in now, trust is placed in your hands as to at which point you should initiate a check-in between now and the end of July.

What is the organisation going to do with this information?

No detailed personal information will be held or used by the organisation. High level themes which emerge from all of these conversations will be gathered anonymously, and collated to inform the content of the Trust's Health and Wellbeing Strategy, as well as the work of the Health and Wellbeing Team.

Other data sources will also be used for this such as Staff Survey results, Pulse Survey results, and anecdotal feedback from Health and Wellbeing Ambassadors.

My staff member is on long-term sickness absence/on maternity leave – do I need to have a check-in with them still?

If a member of staff is off on long term sick then there should already be a plan in place around how you communicate with them. HWB check-ins will form part of that communication plan. You might discuss some of this as part of their plan to return to work, and you might leave some of it until they return as part of their 'Welcome Back' discussion.

If your member of team is on Maternity Leave, you might want to have this discussion as part of their 'keeping in touch' days when you are discussing a return to work or as part of their 'Welcome Back' discussion. You shouldn't contact them for the sole purpose of having this check-in.



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Do health and wellbeing check-ins need to be recorded on ESR?

No, NHS England and NHS Improvement are not asking for check-ins to be recorded and there is currently no national intention to ask organisations to confirm how many have taken place.

As previously described, you may wish to record the actions through a [check-in activity sheet](#), but this is optional and there is no requirement for this to be formally recorded anywhere.

If you do decide to record the date of the check-in, we would encourage an approach that doesn't come at the cost of the frequency or authenticity of the conversation.

What we do however ask managers to do, is to keep a note of any themes which are emerging from these check-ins (anonymously – we don't need anything attributed to individuals). The Trust's Health and Wellbeing team will be asking various forums around the Trust for feedback, and this will inform the development of health and wellbeing strategy. If we know what our people are asking for support with, it makes it easier to put the right support in place.

What if I'm asked about flexible working, and my team member has already made a request within the past 12 months?

In line with the Trust's Flexible Working policy normally a member of staff is entitled to submit one flexible working request in a twelve month period. However, the pandemic has introduced a degree of flexibility in the way that we all work which we had possibly never considered before.

Accordingly, if flexibility in their work is something which an individual wishes to explore and although this may have been discussed once already in the past 12 months, we would encourage you as a manager to take a sensible approach; consider this in the context of current service provision and support and promote flexibility wherever possible.

I think an employee would benefit from chatting with like-minded people. How can I enable this?

You might want to consider directing an employee to one of our staff networks. Further information on these, including meeting dates and times, can be found on StaffZone.

We currently have [BAME](#), [LGBT+](#), [D-Ability](#) and [Women's](#) staff networks at Gateshead Trust.