

Reference Number: UHB 280 Version Number: 3a	Date of Next Review: 22 Nov 2026 Previous Trust/LHB Reference Number: T227
REDEPLOYMENT PROCEDURE	
<p>Introduction and Aim</p> <p>The Redeployment Procedure supports employees whose employment is at risk to find suitable alternative employment within Cardiff and Vale University Health Board, ensuring continuity of employment. Redeployment gives us the opportunity to be innovative, making full use of the skills and experience of all staff to respond to these challenges.</p> <p>Redeployment should be utilised to retain and develop experienced and skilled staff. There are a number of reasons why an employee’s job can be at risk, including reasons such as: organisational change, ill health, disciplinary, capability/performance, relationship breakdown and the non-renewal of a fixed term contract.</p> <p>The aim of this procedure is to ensure a fair and equitable approach to redeployment is followed, whilst providing a comprehensive guide for managers and employees surrounding their responsibilities, and the principles and process of redeployment.</p> <p>Although the process of finding a redeployment opportunity is coordinated by People Services, the responsibility and ownership for actions taken is shared with the individual concerned and their substantive line manager, who are both expected to take all possible steps to find and pursue suitable opportunities.</p>	
<p>Objectives</p> <ul style="list-style-type: none"> • To provide clear advice, support and guidance to managers and employees regarding their role(s) in the redeployment process where employees are supported into suitable alternative posts. • To outline the redeployment procedure to be followed and signpost managers to standard letters. 	
<p>Scope</p> <p>This procedure applies to all UHB staff.</p>	
<p>Equality and Health Impact Assessment</p>	<p>An Equality and Health Impact Assessment has not been completed because this procedure has been written to support the implementation of the Adaptable Workforce Policy. The Equality and Health Impact Assessment completed for that policy concluded there was a positive impact of the redeployment process.</p>
<p>Other relevant documents</p>	<p>Adaptable Workforce Policy NHS Wales Organisational Change Policy NHS Wales Managing Attendance at Work Policy Cardiff and Vale Flexible Working Procedure Cardiff and Vale Equality, Inclusion and Human Rights Policy</p>

Document Title: Redeployment Procedure	Page 2	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

	Cardiff and Vale Fixed Term Contract Procedure NHS Wales Capability Policy NHS Wales Disciplinary Policy and Procedure NHS Wales Respect and Resolution Policy Relationships in Work Procedure
Approved by	Employment Policy Sub Group
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<u>Disclaimer</u> If the review date of this document has passed, please ensure that the version you are using is the most up to date either by contacting the document author or the People Assurance and Experience team	

Document Title: Redeployment Procedure	Page 3	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

Summary of reviews/amendments			
Version Number	Date of Review Approved	Date Published	Summary of Amendments
1	12.01.2016	02.02.2016	Separate Procedure developed in line with the current UHB template. Previously included in the Redeployment Policy. Protection arrangements updated and new section on temporary redeployments due to sickness absence. New section on using Trac for redeployment searches.
2	30/09/2020		Page1 updated legal definition of suitable alternative employment
			Page 6 1.1 Added the requirement for the redeployee to respond to potential roles identified by the TRAC process
			Page 6 1.2 Added responsibility of substantive manager regarding 'temporary' as well as permanent redeployment
			Page 8 1.4 Added the need for HR to add the redeployee's details to the TRAC system
			Page 8 1.5 Added the need for Occupational Health to provide advice on whether 'temporary or permanent' redeployment would be suitable
			Page 9 2.1 Added that medical advice must be sought before the decision is made to permanently redeploy
			Page 9 2.1 Added reference to the need to refer to the Managing Attendance at Work Policy
			Page 9 2.2 Added reference to the Capability Policy
			Page 11 3.2 Added the need for the line manager to write a letter following the meeting
			Page 11 3.3. Added a section on how the employee details will be added to TRAC
			Page 12 3.4 Added a section to confirm

Document Title: Redeployment Procedure	Page 4	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

			the 12 week notice period/timescale
			Page 12 3.6 Added that the employee should have the opportunity to visit the department prior to interview
			Page 133.6 Added that Occ Health advice can be sought to deem if post is suitable and what reasonable adjustments are required
			Page 13 3.6 Added that the employee can also apply for jobs of their own accord
			Page 16 Flowchart updated
3	17/08/2023		All reference to Human Resources or HR changed to People Services Redeployment Proforma renamed as Redeployment Form
			Page 1 Introduction and Aim amended to reflect focus on staff retention and retaining the skills and experience of our staff.
			Page 6 Definitions table added with key terms referenced.
			Page 8- 10 Responsibilities Responsibility added for redeployee to contact relevant support when searching for roles and to ensure a current email address is provided for point of contact. Responsibility added for substantive manager to Identifying suitable permanent redeployment opportunities and vacancies and sending them to the redeployee and People Services Responsibility amended for People Services to update TRAC when a redeployee starts a trial to extend the search period.
			Page 11 2.1 Wording adapted and reference made to action in conjunction with MAAW policy 'Final Formal Sickness Meeting'
			Page 11 2.2 Temporary Redeployment section moved to 2.2 and focus removed surrounding just sickness absence

Document Title: Redeployment Procedure	Page 5	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

			example.
			Page 13 2.4 Section adapted to reference the Respect and Resolution Policy and Relationships at Work Guidance when relationship breakdowns occur.
			Page 14 2.6 Section added for the non-renewal of a fixed term contract as a reason for redeployment.
			Page 16 3.3 responsibility added for redeployee to provide a current email address for the TRAC website so there is a clear point of contact and an email that is monitored. 3.4 Timescales outlined for each reason. FTC search period is in line with contractual notice period up to 12 weeks. R&R or Capability /Performance issues in line with 12 week search period with added emphasis that if roles are not found at the end of the 12 weeks, a meeting will need to take place to assess next steps/progress.
			Page 17 3.5 Suitable Alternative employment section amended to add situation where redeployee is unreasonably refusing roles and consideration as to whether redeployment can be further supported.
			Page 18 3.7 Emphasis added for receiving managers to consider redeployees as priority over other candidates. 3.8 Trial Period timeframe clarified that it should be 4 weeks with the scope to extend up to 12 weeks if further training/time is needed.
			Page 27 - Appendix 1- Redeployment Process Flowchart amended to show clearer process.
3a	24/05/2024		Page 15 4.4 Timescales amended

Document Title: Redeployment Procedure	Page 6	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

Contents

1	Definitions	7
2	Responsibilities	8
3	Circumstances That May Lead to Redeployment <ul style="list-style-type: none"> • Redeployment due to health reasons • Temporary Redeployments • Redeployment due to Capability/Performance Issues • Redeployment following Disciplinary Action • Respect and Resolution – Breakdown in Relationships • Non-renewal of a Fixed Term Contract • Other Situations 	11
4	Procedure	14
5	Redeployment to a Fixed Term Contract	18
6	Pay During Trial Period	18
7	Pay Protection	18
8	End of Redeployment Process	18
9	Appeals	19
Appendices		
1	Redeployment Process Flowchart	20

Document Title: Redeployment Procedure	Page 7	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

1. DEFINITIONS

Term	Definition
Pay Protection	Pay protection is a payment made to top up an employee's average earnings, in order to prevent them being financially disadvantaged for a specified period of time.
Receiving Manager	The receiving manager is the manager of the post that the redeployee is redeployed into, (including on a trial basis); or the manager with a potentially suitable alternative post.
Redeployee	A redeployee is an employee who is unable to remain or return to their existing role, either on a temporary or permanent basis.
Redeployment Form	The redeployment form is completed by the redeployee, outlining their skills, experience and category of role they are looking for in order to support in identifying suitable alternate employment opportunities.
Staff at risk	Those staff identified as being at risk of losing their job and who enter the redeployment process to seek suitable alternative employment
Substantive Manager	The substantive manager is the manager of the employee who is seeking redeployment.
Substantive Post	The substantive post is the post which an employee holds, or would normally occupy, at the time the need for redeployment is identified.
Suitable Alternative Employment	A post which is considered 'substantially equivalent' to the employee's current post, which must be of the same banding or one below, taking into consideration skill set and working conditions.
Unreasonably Refuse	Whereby an offer of suitable alternate employment is refused without substantial or justifiable reason.

Document Title: Redeployment Procedure	Page 8	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

2. RESPONSIBILITIES

2.1 The **redeployee** is responsible for:

- Co-operating with and adhering fully to the Redeployment Procedure
- Actively looking for suitable alternative roles and responding in a timely way to posts identified for them, including via the Trac process
- Providing a current email address so that Trac, People Services and Substantive manager can send job alerts. There is a requirement also to check this email account regularly
- Completing the Redeployment Form with their manager in a timely way at the start of the redeployment process
- Providing detailed, prompt and accurate information throughout the redeployment process, particularly if absent on sick leave
- Being as flexible as possible when considering alternative posts; which may include considering applying for different roles, work location, developing new skills and not unreasonably refusing a suitable alternative role
- Being available to attend redeployment meetings and informal interviews when required (including Occupational Health appointments if appropriate)
- Participating fully in any training required
- Contacting their line manager, People Services or trade union representative if they would like further support searching for roles or if a role has been identified.

2.2 The **substantive manager** is responsible for:

- Ensuring that the Redeployment Procedure is followed for any of their team members as soon as it is identified they require redeployment
- Exploring and facilitating temporary redeployment, where appropriate, for staff who are unable to attend work in their current role due to ill health or other reasons
- Seeking People Services advice when they become aware of any potential redeployment situations
- Ensuring Occupational Health advice is sought in a timely manner where appropriate i.e. redeployment on the grounds of ill-health
- Maintaining a record of all meetings and communication regarding the redeployment procedure in relation to any of their team members
- Identifying any suitable permanent redeployment opportunities and vacancies and sending them to the redeployee and People Services
- Identifying any suitable alternative posts available within their area prior to them being advertised
- Supporting and encouraging the enhancement of transferable skills by training, re-training and coaching
- Ensuring that the redeployee is allowed reasonable time during working

Document Title: Redeployment Procedure	Page 9	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

hours to pursue redeployment opportunities and attend relevant training/meetings

- Supporting their team member throughout the redeployment process and providing ongoing advice and signposting to additional support where appropriate
- Completing leaver documentation correctly and in a timely manner. This may be a termination or PIF form, depending on whether or not suitable alternative employment has been found.
- Where the post is at a lower band, the substantive manager will be responsible for paying the top-up costs of the employee's salary

2.3 The **receiving manager** is responsible for:

- Ensuring preference is given to redeployment candidates where there is a skill match or potential skill match for a vacancy in their area
- Meeting with redeployees within a reasonable timeframe of their vacancy being highlighted to a redeployee; including via the Trac system
- Conducting informal interviews in line with the Redeployment procedure
- Liaising with People Services and providing up- to-date information about individuals' progress with the redeployment process
- Providing written feedback to People Services where they are unable to offer a trial period to someone identified as a match for their vacancy. This information should include where the employee has not met the essential criteria within the job description and person specification
- Maintaining contact with the substantive manager and the People Services lead throughout the trial redeployment process
- Supporting the redeployee during any trial period by meeting regularly and providing clear objectives and additional support where required
- Funding the salary costs attached to any trial periods. Where the post is at a lower band, the substantive manager will be responsible for paying the top-up costs of the employee's salary. Advice should be sought from People Services if either party is unsure of their responsibilities.

2.4 **People Services** are responsible for:

- Ensuring adherence to the Redeployment procedure, providing support and guidance to managers and affected employees and liaising with the employee's union representative as appropriate
- Establishing with the employee the types of posts and specific areas that they wish to be considered for, enabling the best opportunity for successful redeployment
- Entering and continuing to update the employee details onto the Trac system as appropriate, particularly if the employee enters a trial redeployment opportunity

Document Title: Redeployment Procedure	Page 10	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

- Helping to identify any suitable alternative posts for redeployees
- Notifying the manager when their vacancy is identified as a suitable match, and advising on and supporting the process going forward
- Providing ongoing advice to the redeployee, their current line manager and the potential receiving line manager throughout the process, including the need to offer trial periods.

2.5 The **Occupational Health** department are responsible for providing advice regarding:

- Any reasonable adjustments which may be recommended to enable the redeployee to fulfill the requirements of the position
- Providing guidance/recommendations on whether temporary or permanent redeployment is suitable in situations when an employee is unable to remain in, or return to, their substantive post due to a health-related issue

2.6 **Trade Union Representatives** have a role in supporting and advising employees regarding the Redeployment process and working with the staff member and managers to help to achieve a successful outcome

Document Title: Redeployment Procedure	Page 11	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

3. CIRCUMSTANCES THAT MAY LEAD TO REDEPLOYMENT

3.1 Redeployment due to health reasons

Redeployment should be considered if, due to ill-health or disability an employee cannot continue in their substantive post and all applicable reasonable adjustments have been made.

Where it is recommended by the Occupational Health Department that an employee can no longer carry out the duties of their post due to health reasons, redeployment on ill health grounds can be considered.

Up to date medical advice should be received from the Occupational Health department, (unless it is agreed that previous advice is sufficient), for all cases involving permanent redeployment.

The permanent redeployment process is managed in conjunction with the Managing Attendance at Work Policy, in particular the 'Final Formal Sickness Meeting' process. Please refer to the Managing Attendance at Work Policy for further information on this process.

Pay protection will not apply to employees redeployed due to health reasons.

3.2 Temporary Redeployments

There may be occasions when Occupational Health, a General Practitioner or Consultant suggests that it may be appropriate for a member of staff to work outside of their normal area of work for a specific period of time as an aid to their rehabilitation and return to normal substantive post. For example: a staff member may be unable to perform the physical aspects of their role whilst waiting for /recuperating from surgery. Medical advice is not always required to support a staff member with temporary redeployment, this can be agreed locally with the line manager and staff member if the case is not complex in nature. These instances should be managed in line with the Managing Attendance at Work Policy within the 'Temporary Redeployment' section.

3.3 Redeployment due to Capability/Performance Issues

Employees can be redeployed as a result of capability/performance issues. This may result in these employees only being eligible for vacancies banded below their substantive post. In such matters, advice should be sought from the People Services department.

Document Title: Redeployment Procedure	Page 12	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

For any employee redeployed on the grounds of capability/performance issues, please refer to the Capability Policy in conjunction with this policy.

Pay protection will not apply to employees redeployed on the grounds of capability/performance.

3.4 Redeployment following Disciplinary Action

Employees redeployed as a result of a conduct/disciplinary issues will generally be eligible only for vacancies banded below their substantive post. Please refer to the Disciplinary Policy and Procedure for further clarification.

3.5. Respect and Resolution – Breakdown in Relationships

In circumstances where a relationship may cause difficulties in enabling either member of staff to carry out their duties, and having exhausted all other options, it may be necessary to transfer one or both members of staff to another area of work. This could apply where there are concerns about professional responsibilities, clinical practices, favoritism, allegations of bullying, bias and conflict of interest.

In the event of such a move being identified, the UHB will consult with both members of staff to try and reach a voluntary agreement regarding the transfer.

Compulsory redeployment will only be considered where voluntary agreement cannot be reached and when the situation cannot be satisfactorily addressed by less disruptive measures.

When determining which employee should be redeployed, the factors to be taken into consideration will include:

- The requirements of the service
- The redeployment opportunities available
- The personal circumstances involved

In these circumstances it is not appropriate to give notice, but all other elements of the Redeployment Procedure should be followed to ensure fairness and consistency.

Where the Redeployment Procedure is being used as a consequence of inappropriate behaviour or a breakdown of relations, the Disciplinary or Respect and Resolution Policy should also be applied.

This procedure should be used in conjunction with the Relationships at Work Procedure.

Document Title: Redeployment Procedure	Page 13	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

3.6 Organisational Change

Where redeployment is required as a consequence of employees being displaced due to organisational change, the Organisational Change Policy should be followed.

3.7 Non-renewal of a Fixed Term Contract

It is advised that managers should contact People Services at the earliest opportunity, if an employee's fixed term contract is ending or not being renewed.

If the option of redeployment is being offered, the redeployment search period for employees displaced as a result of non-renewal of a fixed term contract will be for a period no less than the contractual notice period, as detailed in the Fixed Term Contract Procedure. A **maximum of 12 weeks** can be supported for the redeployment search period, unless exceptional circumstances apply. If a trial is offered for the role, this should be for a **maximum duration of 4 weeks**. Following the trial period, it should be determined with the redeployee whether the role will become their new substantive post.

If the employee has not secured an alternative post prior to the end of their notice period, their employment will end with the UHB as per that earlier meeting. It is important to consider the employee's redundancy rights and if this does apply, the Fixed Term Contract Procedure should be followed.

It is expected that managers will support employees in these circumstances with reasonable time off to attend interviews and it may also be possible that if the employee secures a role during their search period, they may leave their role sooner than the official fixed term contract end date.

3.8 Other Situations

If any other situations arise whereby a manager feels redeployment may be appropriate, advice should be sought from the People Services Team.

Document Title: Redeployment Procedure	Page 14	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

4. PROCEDURE

Appendix 1 contains a flowchart of the Redeployment Procedure

4.1 Representation

The UHB is committed to partnership working and will work in partnership with the individual and their representative at all stages of the redeployment procedure

Employees are entitled to be accompanied by a trade union representative or a work colleague, not acting in a legal capacity, at any stage in the process, apart from informal or competitive interviews.

4.2 The Redeployment Meeting

When it is identified that an employee requires redeployment, the substantive manager and a People Services representative will arrange to meet with them. The employee may wish to be accompanied at this meeting.

The employee should complete the Redeployment Form identifying their skills, qualification and experience, prior to the meeting and this should then be discussed during the meeting.

The meeting will follow the application of the Redeployment Procedure alongside any other relevant policy.

During the meeting, the stages of the Redeployment Procedure will be discussed and each person's role and responsibilities within the process explained and next steps clarified.

A letter confirming the discussions which took place at the meeting and, giving the employee notice of termination of their contract of employment (where appropriate), should be sent to the employee by their line manager.

4.3 Registration onto the Trac Recruitment System

Following the redeployment meeting, the employee will be added to the redeployment pool on the Trac database, indicating the start and end dates of the search period.

The employee will receive regular e-mail updates from the Trac system and should access their e-mail account regularly. This email address should be

Document Title: Redeployment Procedure	Page 15	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

confirmed within the first redeployment meeting to ensure there is a clear point of contact. If the employee has not found suitable alternative employment and is still on the register at the end of the search period, they will receive a final e-mail advising them that the search is coming to an end.

4.4 Timescales

Redeployment due to health reasons

There will be a redeployment search period followed by a notice period, with the option of Pay in Lieu of Notice (PILON). However, it is recognised that this will not suit all individuals, so the option to run the two processes concurrently or to make other reasonable adjustments is available but only for cases where this is mutually agreed.

Redeployment due to a non-renewal of fixed term contract

Opportunities will be sought for a minimum of the redeployees contractual notice period, up to a maximum of 12 weeks, excluding any trial period.

Redeployment due to a breakdown in relationships and capability/performance issues

Opportunities will be sought in line with the redeployment search period of 12 weeks. If no suitable alternative employment is found at the end of this period, then a meeting should be convened with the substantive manager and employee to determine whether or not redeployment opportunities can further be supported.

Advice should be sought from People Services prior to this meeting taking place.

4.5 Identification of Suitable Alternative Employment

Suitable alternative employment is employment that is 'substantially equivalent' to the employee's current post, taking into account the employee's skill set and job content, terms of pay, working hours, status, band, location (including access to work) and working environment (including access to health enhancing opportunities). Suitable alternative employment will only be deemed appropriate where the employee secures a post at either the same band as their substantive post, or one band below.

Wherever possible a vacant post should be identified as an opportunity for redeployment before it is advertised. There is an expectation that managers will be required to also consider suitable candidates **before** their vacancy is approved for advert. This means recruiting managers may not need to

Document Title: Redeployment Procedure	Page 16	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

advertise the role if a redeployee is considered suitable for a trial.

If the vacancy has already been advertised and candidates have been shortlisted, the receiving manager should still consider the redeployee as a priority over any other candidates. If the redeployee is successful, the vacancy should be closed via Trac and other candidates should be informed as appropriate.

Where a potential match is identified (where the employee's skills, experience and qualifications meet the minimum requirements on the Person Specification) the employee will typically be notified by Trac.

The People Services representative will liaise with the employee and receiving manager to arrange an informal interview and share the relevant paperwork i.e. Job Description/Person Specification and Redeployment Form.

If it is considered that the employee has unreasonably refused suitable alternative employment opportunities to which they have been matched, or is not engaging with the process, a decision may need to be taken to convene a meeting to consider whether any further redeployment opportunities should be offered. It is hoped that through discussions with the employee that this situation would be exceptional.

4.6 Informal Interview

It is expected that the redeployee should be given the opportunity to visit the relevant department prior to the interview.

Where only one redeployee expresses an interest in a vacancy, and meets the essential criteria for the post, the receiving manager will meet with them to discuss the role in greater detail and identify whether the employee's skills, knowledge and abilities match the essential criteria of the person specification. Any limitations, reasonable adjustments, training needs and the ability to work at different locations and/or different hours will also be explored.

Where there is more than one redeployee interested in the post, competitive interviews will take place.

Occupational Health advice may be sought to establish whether a post offered through redeployment on the grounds of ill health is suitable for an employee and whether any reasonable adjustments should be considered.

The redeployment process does not preclude the employee from applying for any posts via the normal recruitment process at any stage.

4.7 Redeployment Option Declined / No Match Identified

Document Title: Redeployment Procedure	Page 17	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

If employees are not interested in a vacancy which has been identified by Trac as potentially suitable, the People Services representative and substantive manager will discuss the implications of their decision with them and their reasons for declining the opportunity will be noted.

Receiving managers who choose not to offer a trial period must provide substantiated and reasonable evidence for their decision. The reasons will be provided in writing and shared with the individual to assist them in the future.

4.8 Trial period

To overcome any concerns on the part of the employee and receiving manager, any redeployment will be subject to a trial period of at least four weeks (which can be extended up to twelve weeks in certain circumstances e.g. the manager and employee agree that appropriate training and induction would take longer than four weeks). Any notice given will be paused for the duration of the trial period.

During a trial period the employee's details will be amended on the Trac recruitment system to reflect the extension of the redeployment search period. This will ensure that their place in the redeployment pool does not expire too soon.

The trial period is funded by the **receiving manager**.

The receiving manager should set out and agree clear, achievable objectives with the redeployee at the beginning of the trial period so that progress can be monitored by all parties. There should be regular meetings throughout the trial period to review progress against the objectives, any training agreed and support provided. This should be documented. Reviews by Occupational Health may also be appropriate if the redeployment is due to health issues.

If all parties agree that the redeployment is not working out, the trial period could be ended early, or if everything is going well the individual can be made substantive sooner. If the trial period is deemed unsuccessful and ended early, the individual will stay in the redeployment pool for the remaining weeks of the original redeployment search period. Details of why the redeployment was unsuccessful must be recorded by the substantive manager and retained on the individual's personal file.

At the end of the trial all parties will meet to formally review the situation and decide if the employee will be redeployed permanently into that post.

If a redeployment trial period is unsuccessful, normally one further opportunity will be sought i.e. a total of two. If an offer of redeployment to a post which is considered to be appropriate and reasonable is rejected by the individual, no

Document Title: Redeployment Procedure	Page 18	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

further redeployment will be offered. In exceptional circumstances, e.g. to ensure compliance with the Equality Act 2010, a maximum of three trial periods may be provided if it is possible to do so.

5. REDEPLOYMENT TO A FIXED TERM CONTRACT

Redeployment into a fixed term contract should only be considered if there are no permanent posts available. Should the employee be redeployed into a fixed term contract, the employee will continue to accrue redundancy rights for the duration of the contract.

The employee will remain in the redeployment pool for the duration of the fixed term contract, so that a substantive post can be identified.

6. PAY DURING TRIAL PERIOD

With the exception of redeployment due to capability or disciplinary issues, during the trial period the individual's pay will continue as if the individual was in work in their existing substantive post and excess travel / car parking will be paid.

7. PROTECTION OF SALARY

Short term pay protection, depending on the circumstances, will be considered in cases where there has been a compulsory redeployment as a consequence of a personal relationship issue or through Organisational Change. The duration of the short term pay protection will be based on the individual's length of continuous NHS service and will be funded by the substantive (i.e. original) department.

Pay protection will not normally be considered in any other circumstances. The implications of this should be fully explained at the start of the process.

8. END OF REDEPLOYMENT PROCESS

If it is agreed that the trial period is successful and the individual is made substantive in that post, the substantive and receiving managers must update ESR as appropriate. The employee will be paid at the pay band for the post in question. Any appropriate NHS employment checks must be undertaken prior to granting substantive employment.

Should the search for suitable alternative employment prove unsuccessful employment may be terminated in line with the contractual notice provisions. The substantive manager must ensure that payroll is informed of this by completing a termination form towards the end of the search period.

Document Title: Redeployment Procedure	Page 19	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

9. APPEALS

Any employee who feels they have been treated unfairly during the redeployment process, or can demonstrate that the procedure has not been properly followed, can raise their concerns as part of their appeal against termination or in line with the Respect and Resolution Policy.

Any appeals against termination should be submitted in line with the relevant policy (e.g. Managing Attendance at Work, Disciplinary, Capability).

Document Title: Redeployment Procedure	Page 20	Approval Date:05.06.24
Reference Number: UHB 280		Next Review Date:22.11.26
Version Number: 3a		Date of Publication:19.06.24
Approved by: Employment Policy Sub Group		

Appendix 1- Redeployment Process Flowchart

