

# Members' Briefing REVENUE & CUSTOMS GROUP

To: **All Members**

cc: **Branch Secretaries, Group Executive Committee, Equality Chairs, VOAC** (for info)

Can this Briefing be circulated via HMRC IT systems: **YES**

Website: **YES**

Action to be taken: **For the attention of all members**

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## RETURN TO OFFICE PROCESS

### 1:1 Meetings Required Using New Toolkits

- *PCS Advises Members to Engage in the 1:1 Process*
- *Supported Return Arrangements Available if Required*

PCS has, alongside our sister trade union ARC, engaged with HMRC in discussions regarding the employer's expectations for workers to return to the workplace. Initial discussions took place in advance of the announcement from the HMRC CEO Jim Harra, which gave notice on the arrangements that will apply from the end of this month. Our representatives have also been talking to the employer's representatives on the detailed policy approach that will apply to all HMRC workers in respect of returning to the workplace. This briefing sets out the policy position and the PCS advice on how members engage with the individual discussions that will now take place. At the moment, the return to office discussions will involve people based in England and Scotland. People based in Northern Ireland and Wales will continue to follow [existing arrangements](#).

### Safety First

In common with the approach adopted since the onset on the Covid-19 Pandemic PCS has sought to ensure that the safety of the workforce is the priority for HMRC. The comprehensive policy guidance that has been agreed over the past two years has been a product of that positive engagement between the trade unions and the employer. Central to this has been the use of Toolkits to assist with any discussions where attendance at an HMRC workplace or another location is required; this includes customer visits away from an HMRC office. Since September 2021 HMRC and PCS have agreed that the use of the appropriate Toolkit is mandatory where a return to the workplace is envisaged. This approach will continue and for this purpose two new Toolkits have been prepared, these are the Return to Working in an Office Toolkit and the Supported Return toolkit.

### 1:1 Discussions – Return to Working in an Office Toolkit

In England and Scotland, HMRC is asking people to return to the office for an average of 3 days a week, with some business areas able to reduce that expectation to 2 days if circumstances allow.

The arrangements for a return to the office (or any location other than your home) will be subject to 1:1 discussion using the [Toolkit](#). PCS' strong advice is that members participate in the process, but we recognise that members will need support in doing this. If you have concerns about your 1:1, please contact your PCS branch for assistance.

**Please note that the outcome of the process should result in an agreement between you and your manager on your plan to return to the office.**

The employer's guidance says: *If, after working through this toolkit, your personal situation means your return to the workplace will take a bit longer to prepare for, we will work with you to resolve any issues. We will share with managers further support by mid-February to help you work together to develop a short-term additional support plan if required.*

**Managers are empowered to reach an agreement on temporary flexibilities for a return to the office even if these do not in the first instance meet the business expectation. This will be called a 'Supported Return Plan'.**

### **Supported Return Plan Toolkit**

HMRC have published the [Toolkit](#) that will support discussions where you require additional flexibility or do not yet feel able to return to the office. There is no list of prescribed reasons that may lead to agreement on a Supported Return Plan and we expect that this will be useful for everyone who may be concerned about returning to the office at this point. It is essential that people who consider themselves vulnerable for medical or personal reasons consider making use of this Toolkit, a copy of which is attached to this briefing as **Appendix 'A'**.

The Supported Return Plan process is currently time-limited to end by the 30 April 2022. It is important that once a plan is agreed it is then subject to regular discussion with your manager.

If you are unable to agree a Supported Return Plan it is important that you seek advice from PCS by contacting your local branch.

### **Further Action**

Although we have sought to agree a process which is robust and provides good support to both managers and jobholders PCS recognises that this may prove to be a difficult and stressful time for all involved. If you need advice or support your trade union is here to provide it. Whether you have management responsibilities or not PCS can offer you independent advice and assistance. We need to know where the process is working well and where it is not, so please keep in touch with your PCS branch and make sure that your local PCS representatives are aware of your views.

The Group Executive Committee is ready to provide additional support and assistance to branches.

If branches need further support, please contact PCS HQ via [rcgroup@pcs.org.uk](mailto:rcgroup@pcs.org.uk) Branches can also access advice on the return to office process via [dtus@hmrc.gov.uk](mailto:dtus@hmrc.gov.uk)

### **Join PCS today**

If you've read this briefing and you aren't yet a member of PCS, then [join today](#).

### **Get involved!**

Remember, HMRC applies restrictions on the content of union circulars distributed using the department's email system, so make sure that you stay in touch with your union. You can find your membership number in your latest email digest from PCS.

If you haven't already done so, let PCS have your personal/non-work email address and your mobile phone number. We'll only use it to keep you informed about PCS matters. You can update your details securely online by registering for [PCS Digital](#) or by contacting your local PCS rep, and asking them to enter your details securely on the PCS Organising App.

**CLIVE BRYANT**  
Assistant Group Secretary

**ADAM SMITH**  
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## Manager toolkit

### Agreeing a Supported Return Plan: additional support available for colleagues to overcome barriers to returning to the office and our new ways of working

On 31 January 2022 Jim Harra gave notice that from 28 February colleagues in England and Scotland will have returned to the office and moved to our new ways of working. For most colleagues, where their role allows, this will be 3 days in the office and 2 days at home, as set out in our [Balancing Home and Office Working policy](#). Some business areas will be able to accommodate up to three days working at home and this will be communicated by business groups where this is the case. You can find full details and access Jim's article in the [manager support pack](#).

Before colleagues return to the office:

- you need to ensure you've had a conversation with your team members using the return to office discussion toolkit, and
- where you identify that your colleague may need more support, you then use this supplementary toolkit to agree a Supported Return Plan as soon as possible.

### What is a Supported Return Plan?

We expect that returning to the office will be a straightforward process for many colleagues. However, some colleagues may need additional flexibility and support where they face barriers to their return to the office and moving to our new ways of working. This toolkit outlines the flexibility and discretion you have as a manager to put in place a **Supported Return Plan** with your colleague which might run beyond 28 February. This plan must be based on agreed actions/steps to support a return within a specific timeframe agreed.

Supported Return Plans are jointly owned, discussed and developed between you and your team member.

As a manager you will know your colleagues best and through your return to office conversations, you'll be understanding any issues or concerns they may have. To support you in your role, HMRC want to be clear on the flexibilities you have to support your team members based on their specific circumstances and needs.

This guidance sets out:

- When to use this toolkit
- What you can agree as part of a Supported Return Plan
- How long a Supported Return Plan can be agreed for
- When to seek additional advice/support
- Annex A: Example scenarios
- Annex B: How to record the Supported Return Plan (template provided).

### You should use this toolkit when:

- You and your colleague identify, through your return to office discussion, that there is a barrier(s) to your colleague returning to the office by 28 February in line with our new ways of working.
- **and** your colleague needs more time to put plans in place to support them to fully return.
- **and** there are clear actions/steps that you and your colleague agree will enable a return within a specified timeframe.

## What you can agree as part of a Supported Return Plan:

- **Additional time** to enable a colleague to put plans or solutions in place that will enable their return to the office and to move to new ways of working. This could include a phased return or more time working at home, but it's important to work through what is possible, even if this is only a partial move to their new ways of working.
- **The continuation of temporary COVID policy support** such as additional utilities expenses, additional travel expenses and London pay easement (if applicable) while plans are being put in place.

To understand the full range of support that will help you and your colleague develop a Supported Return Plan, please use the comprehensive guidance within [the return to office discussion toolkit](#).

**Important note:** Supported Return Plans need to be documented using the template in this guidance (Annex B).

## How long can a Supported Return Plan be in place for?

- Supported Return Plans should be in place to enable a return as soon as possible
- Plans can be put in place up until **30 April 2022**.

## Where you can get further support

- If you and your colleague are struggling to find solutions or put actions in place as part of a Supported Return Plan, you may find it helpful to seek additional support from your manager and also the Expert Advice Service.
- [Your Trade Unions PCS & ARC, are also a useful source of support & advice for members.](#)

*You should seek additional support and advice from the Expert Advice Service (EAS) if:*

- you are struggling to engage your colleague in a discussion about returning to the office or your colleague is refusing to have the conversation with you
- you have started the conversation with your colleague and your colleague is reluctant to return but you haven't been able to identify a specific barrier.
- your conversation with your colleague draws out very complex issues you feel unable to deal with.
- you and your colleague have been unable to identify a Supported Return Plan that would enable a return by 30 April 2022.
- it becomes apparent that the Supported Return Plan you have agreed may/will not enable your colleague to return by 30 April.

In all of these scenarios, you should seek additional advice from EAS who will be able to support you in how to manage these instances and agree appropriate management next steps.

## Annex A: Supported Return Plan Scenarios

These scenarios will help you to think through potential solutions and types of Supported Return Plans you can agree with members of your team based on their circumstances.

These scenarios are not designed to be exhaustive; we encourage you to work with your team member to find a solution which works for them. We have included a broad range of scenarios on the following themes:

- Apprehension about returning and adapting to change
- Concerns about commuting
- Caring responsibilities
- Workplace adjustments
- Clinical vulnerability to COVID

### Apprehension about returning and adapting to change

#### Jordan and Alex

In their one-to-one conversation, Jordan identifies that while Alex is ready to come back to the office, they are feeling anxious about making the change.

Jordan reassures Alex that they are not alone in feeling like this, and that there are things that Alex can do to build up their confidence to return. Jordan and Alex agree that Alex's experience of returning and adopting new ways of working would be easier for him if he could phase his return over a longer period of time.

Jordan suggests a phased approach as part of a Supported Return Plan. They agree that Alex try a day in the office a week during February building up to three days in the office a week by the end of March. Jordan has advised Alex that he will also attend the office on the same days during this phase so that Alex doesn't feel alone and has a friendly face to talk to throughout the day.

Jordan knows through his one-to-ones with his team that a number of the team are feeling concerned about coming back to work, and he arranges for a PAM Assist live broadcast for his team, to give them some practical hints and tips about managing their concerns. Jordan and Alex will check in regularly to ensure that Alex is feeling supported and comfortable with his Supported Return Plan.

### Concerns about commuting

#### Scenario 1: Tonika and Jay

Tonika's team member Jay has shared during their one-to-one conversation a concern about making the journey by public transport to work. Tonika was expecting this as Jay has shared these concerns throughout the pandemic and knows Jay is feeling increasingly nervous about using public transport. Tonika and Jay explore how a Supported Return Plan could help Jay feel more confident about the commute and adjust into more normal ways of working. Tonika and Jay explore options and agree that because Jay's morning commute is less busy than the afternoon commute, until the end of April Jay will trial working shorter days in the office and leaving earlier to avoid the peak hour travel. Jay will use the flexible working hours scheme to balance out the shorter days on the days they work from home while Jay gets used to the commute and begins to feel more confident and they will review this regularly over the next couple of months.

## Scenario 2: Pat and Sam

Pat and Sam have a conversation and Sam explains that they are feeling ok about working in the office again because they have read the office Working Safely Together guide, which has reassured them about the safety measures in place. However, Sam has said that it's the busy commute that concerns them more and the prospect of both returning to the office and commuting is feeling quite a lot to handle over the next few weeks. Pat and Sam think about how they could make the commute feel a little easier whilst Sam gets used to coming back into the office regularly. They agree a Supported Return Plan that allows Sam to continue to access additional travel expenses so they can take a different route to the office which is quieter but slightly more expensive than their normal commuting costs until mid-April as they adjust to the change.

## Caring Responsibilities

### Poonam and Kieran

Poonam's team member Kieran has shared their concerns about returning to the office recently as they are a single parent and have had to work flexibly to respond to changing childcare situations. Poonam knows that this will come up in Kieran's one-to-one conversation, so Poonam spends some time understanding the different ways they can support Kieran before they have their discussion.

Keiran has a long commute and in order to get home to pick their child up from primary school they have to leave work quite early. Keiran wants to reconnect with the team but expresses concern that having to leave work so early is disrupting their work and means they are not available for their team most afternoons. Keiran is trying to get some afterschool childcare in place but has been told by the provider that it won't be available until after Easter.

In light of this, Poonam and Keiran agree a Supported Return Plan that until after the Easter holidays Keiran can continue to work at home for the majority of the time and will attend the office a couple of times for team meetings. After the Easter school holidays Keiran is able to fully move to their new ways of working and will be attending the office two to three days a week in line with business need.

## Workplace Adjustments

### Steve and Linda

Steve manages Linda who joined HMRC about 3 months ago. Linda has worked from home during this time and needed some specialist IT kit as a workplace adjustment, which is essential for Linda to carry out their role due to a visual impairment. For Linda to effectively implement a mix of home and office working, the specialist IT kit will need to be provided in both locations. Steve has ordered the IT kit to be delivered to the office but has been informed that it will take 6-8 weeks for the items to be delivered.

The IT equipment is not practical for Linda to transport to and from the office on a daily basis. Therefore, Steve and Linda agree a Supported Return Plan that means Linda continues to work at home all the time until her workplace adjustment is in place.

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## Clinical vulnerability to COVID

### Charlie and Sanjay

Charlie and Sanjay have their one-to-one return to office discussion. Due to underlying medical concerns, they agree it would be helpful for Sanjay to undertake the individual risk assessment included within the discussion toolkit. This risk assessment highlights further support and expert advice, including an Occupational Health referral. Charlie and Sanjay realise that it will take a little longer to get this additional advice and support, so they agree a Supported Return Plan that means Sanjay continues to work at home for now until the advice is received, which is expected by mid-March. At this point Charlie and Sanjay will be able to look at the advice together and understand the best next steps to support a return.

## Annex B: Supported Return Plan (*Official-Sensitive when completed*)

To use this form, you will need to download a copy and save to your own files to edit.

*Once the plan is completed, please email a copy to your team member, and retain a copy for your records.*

<b>Colleague's name</b>	Click or tap here to enter text.
<b>Manager's name</b>	Click or tap here to enter text.
<b>Location</b>	Click or tap here to enter text.
<b>Date</b>	Click or tap here to enter text.
<b>Next review date</b>	Click or tap here to enter text.
<b>Further review date</b>	Click or tap here to enter text.



<b>Summary of Supported Return Plan</b>	<p><i>This summary should include:</i></p> <ul style="list-style-type: none"> <li>- The key issues/concerns the plan will address for your colleague</li> <li>- The key details of the plan (i.e., phased return, shorter days in the office etc.)</li> </ul> <p>Click or tap here to enter text.</p>
<b>End date of Supported Return Plan</b>  <i>(no later than by 30 April 2022)</i>	<p>Click or tap here to enter text.</p>

Use this section to record the details of any barriers your colleague might be facing, and the agreed actions that will be put in place – including the dates any actions will be completed by.

Discussion areas <i>(record here any barriers/challenges faced)</i>	Agreed Action Plan		Date of Completion	Additional notes
	Colleague actions	Manager actions		


## Supported Return Plan: progress on review actions

Colleagues and their managers should regularly review the plan at mutually agreed timescales. This should **be at least every two weeks** to ensure plans are on track and to identify whether colleagues need further support or additional actions to be put in place in a timely way. Please record the content of each review discussion and list any resulting follow-up actions and responsibilities below.

### Review 1

Date:

**Review 2**

Date:

**Review 3**

Date:

If further reviews are required, record actions here.

<b>Manager signature and date</b>	Click or tap here to enter text.
<b>Colleague signature and date</b>	Click or tap here to enter text.