Line Managers Handbook - Coventry & Rugby GP Alliance

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Welcome to Coventry & Rugby GP Alliance

We are pleased to welcome you to our team of managers and leaders. We hope your time with CRGPA is both enjoyable and fulfilling as we work together towards achieving our organisational goals.

About Us

Coventry & Rugby GP Alliance is an independent healthcare organisation, owned by local GP practices and proudly embedded within the NHS family. Our mission is to support general practice, enhance patient care, and collaborate effectively with local partners.

As a not-for-profit organisation, our independence gives us the ability to respond quickly to system challenges with a flexible, solution-focused mindset. We operate with professionalism, innovation, and compassion delivering measurable impact within a small portion of the local NHS budget.

We're passionate about what we do and look forward to continuing to being part of the NHS in Coventry and Warwickshire, not only creating and delivering services, but also helping the local care system to adapt and succeed.

In just a few years, CRGPA has successfully developed and implemented a range of frontline NHS services that:

- Strengthen and support local general practice
- Help people stay well and avoid unnecessary hospital admissions
- Increase NHS capacity to relieve system pressures, and
- Enhance the overall quality of local healthcare.

Our success is driven by a unique combination of clinical expertise, deep community insight, and a collaborative, forward-thinking approach. We turn ideas into action, improving care for patients and communities alike.

As specialists in primary and community-based NHS care, we provide thousands of additional GP appointments and offer tailored support for vulnerable patients directly in their homes.

Our Mission Statement

At CRGPA, we stand on the **S.I.D.E** of general practice—a strategic framework that underpins our commitment to strengthening and advancing healthcare across our communities. Each pillar reflects our core purpose and guides the way we work:

- **Support** – We support General Practice at every level: individual Practices, Primary Care Networks (PCNs), Place, and System. We also extend that support to our wider partners and dedicated staff.
- **Innovate** – We embrace innovation by generating fresh ideas and practical solutions to improve healthcare delivery and respond to emerging needs.
- **Deliver** – We are committed to delivering outstanding care to patients and fulfilling our contractual obligations with excellence and integrity.
- **Educate** – We provide high-quality education and training through our teaching practice, professional development courses, and support programmes.

Together, these pillars shape our vision for a stronger, more resilient healthcare system that benefits both professionals and the communities we serve.

Our Values

Trust – We conduct ourselves in a way that builds trust amongst each other and our partners.

Integrity – Everything we do is carried out in an honest and transparent way.

Collaboration – We work together to promote health and wellbeing to the wider community.

Kindness – We act with kindness and compassion towards each other, our partners, and patients.

Empowerment – We empower each other to achieve our goals and provide services that empower patients.

Respect – We treat each other with respect and show the same respect to our partners and patients.

We encourage Managers to nominate their staff for the VIP Quarterly Awards - more information can be found on Staff Zone or weekly Key Message.

Our Handbook

This handbook serves as a practical guide for line managers and team leads, outlining key information about working within CRGPA and clearly setting out the expectations we hold for our teams. It is designed to complement, not replace, our full suite of organisational policies, which are available separately and referenced at the end of this document.

Whether you're new to the organisation or an existing manager/team lead, this resource aims to help you navigate our working environment, understand your responsibilities, and feel supported in your role. We trust that your experience with CRGPA will be both rewarding and fulfilling. If you require any clarification or support, your line manager or HR is always available to assist you.

Line Managers / Team Leads Roles and Responsibilities

As a new or existing manager, you will no doubt have questions at the start and during your employment regarding working with us and this section should provide the information you need about your employment with CRGPA.

Recruitment

All recurrent job roles within the CRGPA, including job descriptions and person specifications, are maintained by HR, who hold the master templates. These can be accessed as needed by contacting the HR department (crgpa.hr@nhs.net) and are to be used where available.

Establishment Panel - Any **new** job roles, titles, descriptions, person specifications and salaries **must** be approved by the Establishment Panel (meet ever Monday) before recruitment begins. These must be agreed upon and signed off prior to advertising the vacancy. For further information see the Establishment and Vacancy Panel Standard Operating Procedure (SOP) available on Practice Index, and the necessary forms are available on Managers Zone - (https://www.coventryrugbygpalliance.nhs.uk/staff-zone/hr-managers-zone/).

Authorisation to Recruit - All requests for recruitment are to be put into writing using the Authorisation to Recruit (ATR) form available on Managers Zone and sent to the Chief Finance Officer (CFO), or for ARRS staff recruitment, to the General Manger, for approval before forwarding onto HR. Ensure all relevant information is added such as Staff Notice Period as agreed by the organisation (appendix 1), if you require a notice period different to what is stated this must be taken through the Establishment Panel.

Certificate of Sponsorship - If a Certificate of Sponsorship is required for recruiting non-UK nationals, this is funded from the recruiting department's own budget and should be factored into recruitment planning and approval gained from the CFO prior to the successful candidate being informed. The Sponsoring a Candidate (Certificate of Sponsorship) SOP is to be followed as this outlines roles that can be recruited into.

Promotion/Transfer - Where vacancies may be filled by promotion or transfer, they will be published to all eligible employees in such a way that they do not restrict applications from individuals with a particular protected characteristic. For this type of recruitment, the Internal Vacancy – Expression of Interest Form is to be completed, available on Managers Zone and sent to HR along with the ATR form.

Adverts - Once all approvals have been gained HR will advertise the position on the platforms selected in the ATR form and progress updates given in the bi-weekly HR recruitment meetings.

Shortlisting - Once the post advertised closes HR will forward CVs to the recruiting manager along with the shortlisting form. The CVs should be anonymised, and the Equal Opportunities section below followed. If they are not, advise HR and ask them to send without the candidates' details.

Interviews - Once reviewed and shortlisted the form, with all sections completed, is to be sent back to HR who will coordinate interview bookings. If you require HR to sit on the interview panel, ensure this is arranged ahead of time. This may be required for more senior roles or if you do not have another interviewee available.
It is the line managers responsibility to ensure a private room has been booked if these are to be face to face and all those on the interview panel are available on the selected dates.

HR will contact the applicants and arrange the interviews, if required. At this stage, ensure you have requested a copy of the interview questions for this post from HR. These should be reviewed and if any changes are to be made proposed in writing to the Head of People to ensure they are suitable. If there are no previous interview questions available, ask HR for the interview questions template.

Interviewer Checklist:

- Understand and apply the agreed selection criteria consistently.
- Ensure all candidates are shortlisted fairly based on these criteria.
- Conduct interviews with at least two interviewers.
- Prepare questions directly related to the job requirements, including a list of what the candidate is expected to include in their answers.
- Avoid questions or assumptions related to protected characteristics.
- If discussing personal circumstances, keep the conversation objective and relevant to job performance.
- Take clear, unbiased notes during interviews to support decision-making.
- Treat all candidates with respect and professionalism throughout the process.
- Ensure right to work checks are completed at the time of the interview, this requires taking photocopies of either a passport or driving licence as well as a copy of any certificate of sponsorship documents (HR can support if in attendance or interviews are taking place at Electric Wharf).

Once the interviews have been completed, ensure **all** interview notes are sent to HR for both successful and unsuccessful candidates along with part 2 of the ATR form, any elements missed will result in delays in onboarding. If there are any changes to the original ATR form such as hours or salary this will need to be reapproved by the CFO, or for ARRS General manager, again before going back to HR.

Self-Employed - If you are employing a staff member on a Self-Employed contract, speak to HR for them to provide you with the Self-Employed contract. Line managers are to ensure pay rates have been given to you by HR for the role, if this is a new role for which they do not have a pay rate, refer to the Establishment Panel.

Ensure the ATR form is completed in the usual way, once finance approval is gained complete the highlighted sections within the contract, sign and send to the staff member to review, complete, sign and return.

Once all areas have been completed, complete part 2 of the ATR form fully, any elements missed will result in delays in onboarding, and send back with the contract to HR with all supporting documents (DBS copy within the last 3 years, proof of immunisations if required, copy of indemnity insurance if required, copies of all training certificates required for the post). See Self-Employed Contracted Staff SOP for more information. A new supplier form will also need to be completed as per the New Supplier Policy for finance.

For more information see the Recruitment and Selection Policy and Recruitment Process SOP.

Equal Opportunities - CRGPA is an equal opportunity employer, and we are committed to treating all our employees and job applicants equally. We will avoid unlawful discrimination in all aspects of employment including recruitment and selection, promotion, transfer, opportunities for training, pay and benefits, other terms of employment, discipline, selection for redundancy and dismissal.

We will take all reasonable steps to employ and promote our employees based on their abilities and qualifications without regard to age, disability, marriage and civil partnership, pregnancy and maternity, race (including colour, nationality and ethnic or national origins), religion or belief, sex and/or sexual orientation. These are known as 'protected characteristics' and we pride ourselves in adhering to these. We will appoint, train, develop and promote based on merit and ability alone.

All our employees have a duty to work with us to ensure equality of opportunity and to prevent discrimination. It goes without saying that we expect our employees not to harass, bully, or intimidate anyone for reasons. We ask that you draw the attention of your manager if you see any suspected discriminatory acts or practices.

Coventry & Rugby GP Alliance will take all reasonable steps to eliminate direct discrimination, indirect discrimination, and victimisation in all aspects of employment. See the Employee Handbook for these definitions.

Sources of Recruitment - The recruitment process will be conducted in such a way as to result in the selection of the most suitable person for the job in respect of abilities and qualifications. We are committed to applying equal opportunities at all stages of recruitment and selection, and mitigations are in place such as anonymising CVs.

Advertisements - Advertisements will aim to positively encourage applications from all suitably qualified people. When advertising job vacancies, to attract applications from all sections of the community, we will, as far as reasonably practicable:

- Ensure advertisements are not confined to those areas or publications which would exclude or disproportionately reduce the numbers of applicants with a particular protected characteristic.

- Avoid setting any unnecessary provisions or criteria which would exclude a higher proportion of people with a particular protected characteristic.

However, where, having regard to the nature and context of the work, having a particular protected characteristic is an occupational requirement and that occupational requirement is a proportionate means of achieving a legitimate aim, we will apply that requirement to the job role, and this may therefore be specified in the advertisement.

Selection Methods - The recruitment selection process will be carried out consistently for all jobs at all levels.

The selection of new employees will be based on the job requirements and the individual's suitability and ability to do, or to train for, the job in question. Person specifications and job descriptions will be limited to those requirements that are necessary for the effective performance of the job. Candidates for employment, promotion or transfer will be assessed objectively against the requirements for the job.

Applicants with a disability, we will have regard to our duty to make reasonable adjustments to work provisions, criteria, or practices or to physical features of the work or to provide auxiliary aids or services in order to ensure that the person with a disability is not placed at a substantial disadvantage in comparison with persons who are not disabled.

Onboarding - HR will complete all onboarding steps for all employees seeking advice from line managers/team leads where required and progress updates will be given in the bi-weekly HR Recruitment meetings. For more information see the Onboarding Process SOP.

Medical Assessment - When you bring a new employee on board, they will be asked to complete a new starter form. This form collects key information that HR require to be able to set up their payroll and other systems, and it also asks about any medical conditions that could affect their work. Reassure your new team members that any medical information they provide is confidential and is used only to help us support their health and wellbeing at work.

If a new starter, or any employee, discloses a medical condition that might impact their role, we may need to refer them to Occupational Health (OH) or request a medical report from their GP. This is to ensure we have the right advice on how to support them and consider any reasonable adjustments.

HR will work closely with you throughout this process and provide advice and support regarding OH referral forms and medical reports. The OH referral form can be found on Managers Zone, it is to be completed by the manager and submitted back to HR for uploading onto the portal. OH will then contact the employee to discuss.

If you have any questions or concerns, see the Occupational Health Policy or contact HR for guidance.

Induction

To welcome new starters and help them settle in as smoothly as possible, a comprehensive induction will be provided to equip them with everything needed to begin their role confidently. The induction process includes:

Corporate Induction (to be completed by HR) covering:

- An overview of employee benefits
- Review and access to key policies and procedures
- Introduction to the wider team
- Explanation of the probation process, including management of the probation period
- Practical information such as booking holidays, reporting sickness, working hours, and more
- Health & Safety induction and handbook.

Team/Service-Specific Induction (to be completed by Line Manger):

- An overview of the new starter's main duties and responsibilities
- Introduction to the immediate team
- Setting initial induction objectives
- Discussion of any additional induction training needs, including staff and manager training, and
- If the employee has budgetary or purchasing responsibilities, they will need to be trained by the finance team to raise purchase orders/new supplier forms and delegated authority levels along with standing financial instructions.

Additional Line Manager Responsibilities

- Asking new starters to complete the photo consent form on Cezanne
- Completing the Equipment Form (available on Staff Zone)
- Ensuring the Onboarding Checklist is completed (available on Managers Zone)
- Eligible employees are automatically enrolled into the NHS Pension Scheme unless they choose to opt out. Ensure new starters are aware that full pension details and their right to opt out will be included in their welcome information from HR. You should also inform employees that they can make additional contributions if they want to, and direct them to the Finance Team (crgpa.finance@nhs.net) for more information
- Ensuring staff have access to the Statutory and Mandatory training platform and are aware they need to complete all modules before the end of their 12-week (or 16 weeks if ARRS) probation.

If new starters have any questions at any point, you as their line manager should be available to support them. If not, raise with your own manager. Encourage open communication, at all times, during their induction and beyond.

Meeting Room and Desk Booking

To book a meeting room at Electric Wharf contact crgpa.corporate@nhs.net or speak to the Office and Facilities Coordinator.

To book the meeting room at Foleshill Surgery contact crgpa.at.foleshil@nhs.net.

If you or any staff are attending Electric Wharf and require a workstation, please ensure a desk has been booked via the link to ensure a space is secured as 'Hot Desks' are now limited.

Probationary Period Guidance

Starting a new job can be exciting but sometimes a little daunting for new employees. As a line manager, it's important to remember that all new hires join subject to the satisfactory completion of a probationary period.

During the induction and probation, your role is to support the employee by setting clear induction objectives and ensuring they receive the training and information needed to help them succeed. It's important to have open and honest conversations if any concerns arise.

CRGPA probation includes meetings at weeks 1 (typically induction), 4, 8, and 12 weeks (ARRS also at week 16). Use these meetings to review progress, discuss any challenges, and identify any additional support the employee may need to help them settle into their role effectively. Forms are to be completed to document these meetings for future purposes and can be found under the staff members record on Cezanne under Form Hub, Managers Forms.

If by week 12 (or week 16 for ARRS) you feel the employee requires more time to demonstrate their suitability, you can extend the probation period by a maximum of three months after discussing this with HR and then the employee. If this is the case, inform HR before the probationary period is due to end else it will be taken as they have passed their probation automatically.
Once the probation period is successfully completed, you should inform HR so that full employee benefits can be activated. If the probation is unsuccessful and either you or the employee decide the role isn't suitable, a one-week notice period applies.

Supporting your new starter throughout probation helps ensure a smooth transition and increases their chance of success in their new role.

Employee Assistance Programme (EAP)

As an organisation, we take our employees' health and wellbeing seriously and have support available, should it be needed at any point of employment. As a manager/team lead ensure staff are aware of the below:
Examples include access to a confidential helpline (provided by Vivup) on 0330 380 0658 for mental health support, which is open 24/7, 365 days a year and they offer support for anything you might be

struggling with; and access to Mental Health First Aiders. The link to the Vivup platform can also be found here - Vivup - Employee Benefits Platform Launching 3rd October (mailchi.mp). Staff must have registered with Vivup to gain access to these benefits.

Other Responsibilities

Appraisals

A performance appraisal gives individual employees and you as their manager/team lead an opportunity to set work objectives; review performance, work content, loads and volume; to look back on what has been achieved during the past year then agree future objectives. It is also the time an employee can agree personal objectives, and any learning and development requirements which may help.

The appraisal system is designed to:

- Be a positive process.
- Raise the quality of services provided by motivating staff.
- Increase job satisfaction.
- Identify appropriate training and development requirements.

As a managers/team lead you are responsible for:

- Ensuring each member of staff in your team is clear about what is expected of them.
- Ensuring that new employees have work targets and objectives set as part of their induction.
- Meeting employees on a regular basis to review progress, including an annual appraisal (April each year), mid- year appraisal review (October each year) and end of year appraisal review (March each year).
- Following up actions arising from appraisals.
- Ensuring that a written record of the appraisal meetings is completed/documented and attached to Cezanne.

If the staff member is on national minimum living wage, refer to the Pay Framework (available through HR) on possible pay increment after their first year of working within the organisation and in line with their appraisal and objectives if they have met them. For more information refer to the Appraisal Policy.

Performance Management

Performance management is a critical responsibility for line managers, aimed at fostering a culture of accountability, development, and continuous improvement. Effective performance management involves setting clear expectations, providing regular feedback, and supporting staff in achieving their goals. Managers should conduct structured one-to-one meetings, use objective measures to assess performance, and address underperformance promptly and constructively. More information for supporting line managers can be found within the Dealing with Poor Performance/Capability Policy.

One to Ones

It is the line managers responsibility to ensure regular one to ones are conducted with each member of staff, this helps to foster trust, improve communication, and stay aligned with the staff members goals, wellbeing and performance.

Expectations:

- Hold one to ones at least every 8 weeks,
- Schedule them in advance,
- Treat them as a priority,
- Create a safe space for confidential open conversations.

What to include:

- Review notes from previous meetings (if available),
- Wellbeing – Understand how the employee is feeling personally and professionally,
- Progress update – Review goals, tasks and anything that may be causing an issue,
- Feedback exchange – Give and receive feedback in a constructive way,
- Development – Discuss learning opportunities and growth,
- Support needs – Identify where you can help to remove obstacles,
- Future planning – Discuss priorities for the coming weeks,
- Annual leave – Review and remind about any outstanding annual leave to be taken,
- Statutory and Mandatory training – Review and remind about any outstanding training that is to be completed and set a deadline date,
- Follow up – Document key points and actions, sharing with the staff member following the meeting.

Resolving Problems

At CRGPA, we strive to have a positive team culture based on our values and openness and honesty, however, we know that from time to time, things do not always go as we hope and there may be occasions when team members do not meet our high standards of conduct or performance. We have therefore, put in place clear policies outlining how we will address inappropriate conduct or performance challenges and the processes involved.

Our Disciplinary, Grievance and Bullying and Harassment policies can be found on the policies platform.

Grievances and Complaints

All allegations of discrimination will be dealt with seriously, confidentially and without undue delay. We will not ignore or dismiss grievances or complaints about unlawful discrimination from our team. Such complaints should be raised promptly following our Grievance Policy.

Employees will not be penalised for raising a grievance, even if it is not upheld, unless the complaint was both untrue and made in bad faith.

HR must be contacted for all employee relation issues in the first instance for advice.

Change of Terms

To ensure timely processing of contractual changes, all Change of Terms requests **must** be submitted to the HR department by the 10th of each month, any forms submitted past this deadline **will not** be processed until the following months payroll.

Line Managers are required to:

- Complete the Change of Terms Form, available on Managers Zone,
- Submit the completed form to HR via email.

Late submissions will result in delays to payroll or system updates. Line managers must ensure all changes are communicated promptly and accurately.

It is the line managers responsibility to complete a change of terms form for all staff on national minimum wage at their one-year anniversary with the organisation, This should include an increase from the minimum wage to an additional 1.6%.

For further information see the Change of Terms SOP.

Annual Display Screen Equipment (DSE) Assessments

DSE risk assessments are legally mandated under UK regulations.

Line managers/team leads are to:

- Ensure every team member who uses screens for an hour or more daily completes a **yearly DSE assessment** (in line with their appraisal), covering office/ workplace workstations. These forms can be found in the Onboarding Checklist, or on Staff Zone.
- Follow up more frequently if an employee changes workstation setup, reports discomfort, or change's role, is pregnancy or starts using new equipment.
- As a manager, remind staff to complete the mandatory e-learning and follow ergonomic best practices (adjust chair, screen, keyboard) to prevent musculoskeletal issues.
- If once the form is completed equipment is identified, the DSE is to be shared with crgpa.safety@nhs.net and approval confirmed from the budget holder before equipment is purchased.
- Equipment **will not** be provided for staff working from home.
- If referral to Occupational Health is required, speak to HR.

Flexible Working

As a line manager, it is your responsibility to handle flexible working requests in a timely, fair, and consistent manner. You should support employees who wish to submit a request by explaining the process clearly and encouraging them to put their requests in writing, including details of the changes they are requesting, the proposed start date, and how they think it could work practically following the Flexible Working Policy.

Bear in mind that each flexible working request is considered on its own merits. Approving one employee's request does not guarantee similar requests will be approved for others.

Expenses

As a line manager/team lead, you play a key role in supporting your team with expense claims and ensuring compliance with our Staff Travel & Expenses Policy.

Employees may incur business expenses related to their role, and you should approve only those that are reasonable, necessary, properly incurred and previously agreed. Make sure employees understand that all claims must be accompanied by VAT receipts and submitted through the correct channels.

If your team members use their personal vehicles for work purposes beyond traveling to and from their principal place of work, remind them they **must have** vehicle insurance that covers business use and a copy of this is submitted to HR and Finance. Trips to work are not classed as business use, but any travel during the working day for meetings, visits, or appointments requires the appropriate insurance.

Ensure your staff know they **must not** use their personal vehicles to transport patients.

You may also be responsible for authorising equipment needs. Employees who require laptops or mobile phones for their role should be supported accordingly and requests submitted to the Office and Facilities Coordinator. Once equipment is obtained the equipment form (part of the Onboarding Checklist) is to be completed. Advise staff once they have signed these forms, they are then overall responsible for the equipment. Basic stationery like pads and pens can be collected from head office (Electric Wharf), while specific stationery needs can be reimbursed with your prior approval. Reimbursement information can be found in the Staff Travel Expenses Policy.

Remind your team to submit expenses monthly, including:

- Details of any mileage journeys claimed,
- Receipts for all purchases (including parking tickets).

Note that expenses older than three months will generally **not** be reimbursed unless there are exceptional circumstances.

All expenses forms should be submitted to you as the line manager or the finance department for approval by the 15th of the month, unless otherwise communicated, once received by the line manager and approved, send onto the finance department.

New Supplier

If as a line manager you are involved in the procurement process for new staff (self-employed), equipment or obtaining a new supplier, the New Supplier Policy is to be followed. This is to ensure that finance is aware of the new supplier and can be added to their finance system for approval and payments.

If you obtain a new supplier in form of a contract for items such as IT services, Office Cleaning Services, Electricity, Water, Mobile Phones, Systems, Insurance etc. Ensure the CFO is informed, and a copy of the contract sent to them so they can hold centrally on the Contracts Schedule. This also applies to any existing supplier renewals.

Mobile Phones

As a line manager, you are responsible for ensuring that any mobile phones provided to your team members are used responsibly and securely. CRGPA mobile phones are not for use by every staff member but those in more of a manager/team lead role or those making or receiving calls from patients/practices/stake holders as part of a service. These can be requested through the Office and Facilities Coordinator and an equipment form completed on receiving and returning.

All mobile phones are to be logged with the Office and Facilities Coordinator as assets, to ensure they are traceable and any change in staff member these are not to be passed on but returned to the Office and Facilities Coordinator to be received and logged in and out on the asset management document.

Remind your staff that mobile phones should be treated like any other IT equipment, such as laptops or PCs, and that they must comply with our Information Governance, Information Security, and Data Protection Policies.

If the staff member is using Whats App as a communication method, ensure they have read and understood the Whats App Messaging Policy.

Ensure that all mobile devices are secured with at least a six-digit passcode. If any device is lost or stolen, it is critical that your employee reports this to you immediately so you can take the necessary steps to protect organisational data. By actively promoting responsible use and swift reporting, you help safeguard both your team and the organisation.

Employee Records

We use a system called Cezanne to store employee records, including details such as annual leave, sickness, absence requests, and performance information. You should encourage your team members to keep their personal information, such as home address, contact numbers, and emergency contacts, up to date on Cezanne.

Make sure staff understand that all holiday and absence requests must be submitted and recorded via Cezanne following the Annual Leave, Sickness and Absence Policy.

Once the request is submitted as the line manager/team lead it is your responsibility to approve or reject the request based on rotas or other staff members absences monitoring these records as needed to manage workloads and team availability effectively.

Leave & Absences

Annual Leave

As a line manager, you are responsible for managing and approving holiday requests within your team. Our holiday year runs from 1st April to 31st March.

When employees submit holiday requests via Cezanne (6 weeks in advance of dates requested), it’s your responsibility to review and either approve or reject them in a timely manner. If you are unable to approve a request, you should have a clear discussion with the employee to explain the reasons and explore alternative dates if possible.

For any leave requests over two consecutive weeks, ensure the employee submits this in writing. You should also refer to the Annual Leave, Sickness and Absence Policy to support your decision-making.

Holiday entitlement details are provided in employees’ contracts and can be accessed on Cezanne. Normally, carryover of holiday into the next leave year is not permitted unless there are exceptional circumstances. If an employee requests to carry over holiday entitlement, you should ask for this in writing and then discuss the request with the CEO before confirming any approval.

By managing holiday requests fairly and transparently, you help maintain team effectiveness and support your employees' wellbeing.

Sickness Absence

As a line manager, it is your responsibility to monitor and manage sickness absences within your team, to support employee health and wellbeing.

You must ensure that all sickness absence is accurately recorded on Cezanne by either yourself or the staff member. This allows us to keep precise records and identify any absence concerns early. Make sure your team members know how to notify you of sickness and understand their sick pay entitlement as outlined in their contracts and the Annual Leave, Sickness and Absence Policy.

Any staff member absence related to diarrhea and/or vomiting **must be 48 hours clear** before attending the office or place of work where they interact with other staff members, patient's or members of the public.

Return to Work Meetings

Return to work meetings following any absence relating to sickness are to be recorded on Cezanne, using the correct form with as much information as possible and should be scheduled on the day the staff member returns.

If you observe frequent or prolonged absences, it is important to address these sensitively and proactively, offering support and discussing any underlying issues. Following the triggers guide in the Annual Leave, Sickness and Absence Policy.

Other Leave

Other leave is typically granted on a case-by-case basis. While the standard practice is to offer up to 5 days (pro rata) of paid leave, if an employee exhausts their compassionate leave in a rolling one year, it is unlikely to be awarded again in the following year, except in exceptional circumstances. Ensure that all other leave is accurately recorded in Cezanne.

As a line manager, it's your responsibility to support employees who may be experiencing bereavement or personal difficulties. You have the discretion to grant an appropriate period of paid compassionate leave (up to the 5 days per year, pro rata) to help them through these challenging times.

Encourage open and compassionate communication, making it clear to your team that they can approach you for support during difficult periods. Your understanding and flexibility are essential in fostering a supportive and caring work environment.

Statutory Parental Bereavement Leave and Pay

As a line manager, it's essential that you understand and support employees who may be entitled to statutory parental bereavement leave. This leave applies when an employee loses a child under the age of 18 or if they or their partner suffer a stillbirth after 24 weeks.

Employees who have been continuously employed for at least 26 weeks before the loss and meet the qualifying National Insurance criteria may be eligible for two weeks' statutory parental bereavement leave, and statutory parental bereavement pay at the current rate.

If an employee notifies you of such a situation, handle the matter with sensitivity and confidentiality. Provide clear information about their entitlement and work with HR to ensure appropriate support is offered. Be flexible with how and when the leave is taken, respecting the individual's needs during this difficult time following the Annual Leave, Sickness and Absence Policy.

Maternity, Paternity, Neonatal and Adoption Leave

Maternity, Paternity, Neonatal, and Adoption leave provide employees with time off to care for a newborn or adopted child. Maternity leave is for the mother, while paternity and shared parental leave are for the baby's other parent(s). Neonatal care leave is for parents whose babies require specialised medical attention. Adoption leave covers the period after a child is placed for adoption.

CRGPA is committed to supporting its employees through key life events, including the birth or adoption of a child and circumstances requiring neonatal care. For more information see the Maternity, Paternity, Neonatal, and Adoption Leave Policy. It provides clear guidance on leave entitlements, pay, responsibilities, and procedures, helping employees and managers navigate these important periods with confidence and clarity.

Time off for Dependant Emergencies

You should also be aware that all employees have the statutory right to take reasonable time off to deal with emergencies involving a dependent (someone who relies on them for care).

Situations that may qualify include when a dependent is ill, injured, or assaulted; when care arrangements break down unexpectedly; when a dependent dies; or to manage an unexpected incident involving a child at school.

Encourage your team to speak to you promptly if they need time off for such emergencies. Be understanding and supportive, balancing their needs with the operational requirements of your team.

All leave recordings onto Cezanne feed into the payroll system to support staff in receiving the correct pay as well as HR reporting, therefore ensure all absences are correctly recorded on Cezanne in a timely manner.

Training and Development

You play a key role in ensuring your team completes the required training to perform their roles effectively. Some training is mandatory and assigned to all or specific employees; others may be identified through your regular performance reviews.

Part of your role is to ensure that staff complete all Statutory and Mandatory Training outlined by CRGPA via the training platform. Discuss training progress regularly during one-to-one meetings and address any workload pressures that might prevent timely completion of training. If mandatory training is not completed, this could lead to disciplinary action, so proactive support is essential.

Encourage team members to request additional training if they feel it would enhance their skills and effectiveness in their roles. Training can take many forms, including external courses, internal sessions, webinars, conferences, and on-the-job learning.

For more information see the Study and Training Policy.

Health and Safety

Both Coventry & Rugby GP Alliance and our employees, have legal obligations to ensure, so far as is reasonably practicable, everyone's health, safety, and welfare at work. We have a duty of care towards our employees, however, it is necessary that, as with any successful community, everyone takes a share of responsibility. Our full Health and Safety Handbook and Policy outlines our commitment towards this as well as the duties of both managers/team leads and staff.

Risk Register

CRGPA is faced with several factors that may impact upon its ability to meet its objectives. The effect of uncertainty on those objectives is known as Risk. Risk management can be defined as the identification, assessment, and prioritisation of risks followed by a coordinated application of resources to minimise, monitor, and control the probability and/or impact of uncertain events.

Each manager is responsible for ensuring risk assessments are completed with implementation of suitable and sufficient control measures and for communicating the risk assessment to those affected. Staff risk assessments are available on Staff Zone.

As a manager/team lead you may be involved in reviewing known risks on the CRGPA Risk Register at regular intervals to ensure they continue to be appropriately mitigated, this is in conjunction with the Governance Team.

Conflict and Declaration of Interest

It's important during the course of employment with us that we do not have any conflicts of interest and for clarity, we have put together the below points. On appointment, and annually thereafter unless any changes, complete with your staff the Declarations of Interest form (available within the Line Managers Induction Pack available on Managers Zone) to include any concerns about a potential conflict of interest. Please speak to the Governance Team or refer to the Conflict of Interest Policy for more information:

- They will not allow their outside activities to interfere with their work nor allow any conflict between their duties and their private interests to affect the ability to carry out these duties effectively.
- They will not make use of or exploit CRGPA, or brand names associated with us, their connection with the CRGPA or information obtained in the course of their duties, to further their own private interests or those of any outside organisation, to the detriment of CRGPA.
- They will not act in a manner likely to bring CRGPA into disrepute or to affect our reputation or integrity.

Gifts and Hospitality

A reminder to all that staff should not normally accept any gifts or hospitality offered to them. Any offered gifts should be politely refused unless to do so would cause offence. Gifts of cash and cash equivalents such as vouchers should always be declined. Gifts from suppliers or contractors doing business (or likely to do business) with CRGPA should be declined and the offer entered on the register of gifts and hospitality within 28 days held by the Governance Team. For further information refer to the Gifts and Hospitality Policy.

Public Relations

As a manager, it's essential to safeguard CRGPA's reputation whenever media contact arises. If any member of your team is approached by media or they suspect that's the case, immediately refer the enquiry to the Communications team via crgpa.communications@nhs.net or through the "Media" option on the corporate website's Contact Us page.

- Explain to your team that prompt referral ensures that messages are accurate, consistent, and aligned with CRGPA's communications strategy.
- Reinforce the importance of not responding directly to media enquiries; professional handling protects both accuracy and brand integrity.

Leaving Us

Sadly, staff may choose to leave us or retire and if/when they do it would be appreciated if they could give as much notice as possible in writing to you as their manager. The notice they are required to give is detailed in their contract of employment, as their manager ensure you are aware of this.

If the employee is planning on retiring and contributes to the NHS Pension Scheme, please refer to the Retirement Policy.

When an employee submits their written notice, acknowledge it promptly, confirm the agreed leaving date, and inform HR. Planning early helps reduce disruption and ensures a thoughtful transition.

Collaborate with the departing employee to outline key responsibilities, ongoing projects, and essential contacts. Document procedures, files, and status reports to ensure continuity and prevent knowledge loss.

Use the formal Line Managers Exit Pack (available on Managers Zone) to track the return of all company items such as laptops, phones, badges, keys, etc. and revoke system access and credentials (e.g., email, log in, building access) on their last day.

We like to hold exit interviews with any team members who choose to leave us to gain some feedback on their time with CRGPA, either by completing an online survey or via meeting with the HR department.

HR will confirm final salary payments to payroll, including adjustments for holiday pay, overpayments, or outstanding amounts, are made on time and that the P45 is issued and emailed.

Summary & Associated Policies

We hope that this handbook has provided a useful guide to working at CRGPA. If you have any questions about any aspect of your role, please do not hesitate to speak to your line manager or, contact the HR Department.

Associated Policies

For further information, see the following policies which are available on Policy Index:

- Establishment and Vacancy Panel Form SOP
- Self-Employed Contracted Staff SOP
- New Supplier Policy
- Recruitment and Selection Policy
- Recruitment Process SOP
- Onboarding Process SOP
- Occupational Health Policy
- Appraisal Policy
- Change of Terms SOP
- Staff Travel and Expenses Policy
- New Supplier Policy
- Information Governance Policy
- Information Security Policy
- Data Protection Policy
- Whats App Messaging Policy
- Annual Leave, Sickness & Absence Policy
- Maternity, Paternity, Neonatal, and Adoption Leave Policy
- Study and Training Policy
- Health and Safety Policy
- Health and Safety Handbook
- Grievance Policy
- Flexible Working Policy
- Disciplinary Policy
- Anti-Bullying, Harassment and Sexual Harassment Policy
- Dealing with Poor Performance (Capability) Policy
- Conflict of Interest Policy
- Gifts and Hospitality Policy
- Sponsoring a Candidate (Certificate of Sponsorship) SOP
- Retirement Policy

Appendix 1 – Staff Notice Periods

Roles	Notice Period
Service Administrators, General Administrators / Admin Assistants, Receptionists, Junior Officers	
(TH) Business Apprentice	1 month
Communications & Engagement Officer	1 month
EA Receptionist	1 month
Service Support Centre Administrator	1 month
ATP Patient Support Officer	1 month
HH Receptionist / Administrator	1 month
SMI Admin Lead / Service Support Centre Administrator	1 month
HR Administrator	1 month
ATP Safeguarding Administrator	1 month
Data Analyst	1 month
HH Medical Secretary & Receptionist	1 month
Finance Assistant	1 month
ATP Administrative Officer	1 month
PCN Workforce Support Administrator	1 month
Governance Assistant	1 month
HH Receptionist	1 month
Training Hub Administrator	1 month
Training Hub & Training Centre Administrator	1 month
Team Leads, Site Leads, Project / Support Officers & Co-Ordinators	
ATP Site Lead	3 months
HR Officer	3 months
(TH) Primary Care Education Programme Coordinator	3 months
HH Receptionist Team Lead	3 months
Payroll Officer	3 months
Primary Care Support Officer	3 months
Team Lead - Enhanced Access	3 months
Service Support Centre Team Leader	3 months
Trainee Practice Manager	3 months
Senior Finance Officer	3 months

Roles	Notice Period
Managers, Project Managers, Training Hub Ambassadors, Transformation Leads	
PCN Health and Wellbeing Coach Lead	3 months
PCN Social Prescriber Lead	3 months
PCN Physicians Associate Lead	3 months
PCN Paramedic Lead	3 months
Communications and Engagement Manager	3 months
(TH) Pharmacist Technician Ambassador	3 months
Governance Manager	3 months
ATP Site Manager	3 months
ATP Deputy Business Manager	3 months
Management Accountant	3 months
(TH) Primary Care Transformation Nurse	3 months
(TH) Training Hub Communications & Engagement Lead	3 months
(TH) Primary Care Transformation Nurse	3 months
(TH) GP Workstreams Project Manager	3 months
(TH) Training Manager	3 months
APMS Practice Managers, Heads of, TH Ambassadors, TH Educators & TH Assurance Officers	
Senior Data Analyst	3 months
Head of GP Liaison & Support	3 months
PCN Operations Manager	3 months
(TH) OT Ambassador	3 months
(TH) General Practice Educator	3 months
(TH) Health and Wellbeing and Workforce Planning Mgr	3 months
Hodge Hill Practice Manager	3 months
(TH) Training and Placement Quality Assurance Officer	3 months
(TH) Paramedic Ambassador	3 months
(TH) CWTH Nurse Workforce Lead	3 months
ATP Practice Manager	3 months
Head of ARR's Workforce	3 months
Head of People	3 months
General Manager	
General Manager - PCN Services	3 months

Roles	Notice Period
Chief Officers	
Chief Officers - Finance, Nursing	3 months
TH Chief Operating Officer	3 months
TH Chief Officer	3 months
Chief Executive Officer	3 months
Practice Directors, NEDS, Medical Director / Associate MD, GP Lead Roles	
NED	3 months
Practice Director / Chair	3 months
Medical Director / Associate Medical Directors	3 months
Other TH GP lead roles	3 months
Clinical Roles	
CRGPA Lead Nurse	3 months
ATP Lead Nurse	3 months
ATP Practice Nurse	3 months
Enhanced Access Practice Nurse	3 months
Senior Admiral Nurse - Dementia Lead	3 months
Admiral Nurse	3 months
Health Care Assistant Development Role	3 months
Paramedic	3 months
ATP GP Assistant GPA	3 months
ATP GP	3 months