

## Wellbeing Passport Guidance

### Purpose

The main purpose of the Wellbeing Passport is to support colleagues with a disability or health condition in the workplace. The passport has three main functions:

- To support a conversation between a colleague and their line manager about the reason for needing adjustments which could be due to a disability, health condition or gender reassignment and to discuss any workplace adjustments that might need to be made.
- To act as a record of that conversation and of the adjustments agreed
- To act as a record of any adjustment made for individuals as supportive measures.

The passport will be particularly helpful when a colleague changes line manager, as it will help the new line manager to understand what workplace adjustments the colleague had been receiving previously and avoid the need to begin the process again.

It can also be helpful in starting a conversation about less visible disabilities or health conditions such as mental health.

Advice and guidance may be obtained from other professionals where appropriate, such as the HR advisor, GP, occupational health or access to work. If advice or an assessment is required, details will be recorded in this passport. Please see below for more details on who can help with reasonable adjustments.

### Colleague Responsibility

The completion of the passport is voluntary, however there may be some roles within the society where we make this compulsory to comply with our Health and Safety obligations.

A colleague can include as much detail as you feel is appropriate and they can complete the passport on their own and or with their Manager. Alternatively, the colleague and their line manager can complete it together.

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A discussion with their manager will give the colleague the opportunity to explain the detail within the passport to help them to better understand how they can support you. Whilst it is up to the colleague to decide how much to tell their line manager about their reason for needing workplace adjustments, sharing information can help them to better understand how they can be supported.

Any actions agreed and review dates should then be entered on the passport. You may also want to discuss the contents with appropriate contacts such as a HR Advisor or the health and safety team.

If the colleague's circumstances change, they should speak to their manager to discuss any impact on their agreed workplace adjustments. Adjustments should be reviewed when there is a change or at least every 12 months. If there is a significant change to the reason for requiring workplace adjustments a new passport should be completed.

## Manager Responsibility

The role of the line manager is to create an inclusive culture where people are comfortable sharing information. The managers actions and decisions are of great importance in considering any steps, which might be taken to assist a colleague in their work. The passport is designed to support the manager to do this.

Managers should treat information contained in the passport and discussions with individuals about their disability or health condition in the strictest of confidence. It is important to remember that the passport belongs to the colleague and is confidential.

When a manager receives a passport from a colleague, they should arrange a one-to-one meeting with the colleague as soon as possible. It is for the individual to decide how much to disclose about their reason for requiring a workplace adjustment. However, it is important that a manager can understand how it affects the colleagues day-to-day work and what they can do to support and assist the colleague whilst they are at work.

A manager has a legal duty to ensure that reasonable adjustments are considered for a colleague who has a disability. This will include exploring options for reasonable adjustments with HR, the colleague and other sources of support, such as Occupational Health or Access to Work.

Understanding the impact of the disability or health condition can help a manager to agree with a colleague, which adjustments are most practical and appropriate.

If your colleague's circumstances change due to their disability or health condition you should meet with them to discuss any impact on workplace adjustments and if necessary, complete a new wellbeing passport document. Adjustments should be reviewed when there is a change or at least every 12 months, it is your responsibility to ensure that the review takes place.

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A copy of the passport should be sent to HR to be kept on the colleagues' central personal record. Managers should ensure that the passport is kept in a secure location which is only accessible to the Manager.

## Reasonable Adjustments

Reasonable adjustments need to be considered in the following circumstances:

- Where someone has declared or told us that they have a disability, illness or injury and requested reasonable adjustments.
- Where it might reasonably be expected that someone would need an adjustment, or where it might reasonably be expected that someone is disabled.
- Where making a reasonable adjustment would support the colleague in the workplace, regardless of whether they are covered under legislation.

### Who can help you?

HR Advisors will provide you with advice when considering reasonable adjustments. Help and advice can also (where necessary) be sought from:

- Occupational Health – In some circumstances Occupational Health may be able to provide more advice on the adjustments that will enable a colleague to operate effectively in their role. The HR Advisors will be able to provide you with advice regarding this and assist with the referral
- Health and safety – They can advise on relevant risk assessments to be considered
- Access to Work – Colleagues may self-refer themselves to access to work if they feel it is necessary and is a government grant scheme which supports disabled people in work. Access to Work might offer support with:
  - a British Sign Language interpreter
  - specialist equipment
  - extra transport costs (such as a taxi where no public transport is available)

Colleagues who are members of USDAW may wish to discuss options regarding reasonable adjustments with their Trade Union representative who may be able to offer further support and guidance.

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## When should we be making reasonable adjustments?

Reasonable adjustments should be made whenever necessary. This may include:

- Recruitment and selection: this may apply to the way in which the application is completed, interview or test conducted or any of the criteria applied.
- On starting employment; if a new colleague is starting within your team you may need to make reasonable adjustments.
- At any point during their employment with us
- When undertaking learning and development
- On a change of role or transfer of working environment or conditions

The obligation to consider and make reasonable adjustments means disabled people can overcome any substantial disadvantages they may have doing their jobs and progressing in work.

## What reasonable adjustments should we make?

Each reasonable adjustment plan will be different, based on each colleague's individual situation and what the needs of the business. Due to the size of the Society, the band of reasonableness when considering adjustments is greater. It wouldn't be possible to list all potential reasonable adjustments, but it can be helpful to think of the types of changes that might need to be made:

<p><b>Time</b></p> <ul style="list-style-type: none"> <li>• Flexibility around breaks, start/finish times, or shift patterns.</li> <li>• Reduced working hours.</li> <li>• Additional training time or a longer probationary period.</li> <li>• Allowing time out for frequent hospital appointments.</li> </ul>	<p><b>Policy and Practice</b></p> <ul style="list-style-type: none"> <li>• Regularly reviewing how policies are working for people with disabilities.</li> <li>• Ensure that training is relevant and does not disadvantage someone with a disability</li> <li>• Changing policies that have a negative impact on disabled colleagues.</li> </ul>
<p><b>People</b></p> <ul style="list-style-type: none"> <li>• Additional support and supervision from you as their manager.</li> <li>• Providing your colleague with a buddy or mentor support.</li> <li>• Disability awareness training for your team.</li> <li>• Reader or interpreter support.</li> </ul>	<p><b>Place</b></p> <ul style="list-style-type: none"> <li>• Transfer to a more suitable or closer work location.</li> <li>• Working from home.</li> <li>• Making changes to the building, to help your colleague access their workplace.</li> <li>• Providing aids and equipment, or specialist computer software.</li> </ul>
<p><b>Job</b></p> <ul style="list-style-type: none"> <li>• Providing training or re-training.</li> <li>• Making information and training materials easier for colleagues to access.</li> <li>• Matching duties to your colleague's strengths and abilities.</li> <li>• Swapping some of your colleague's work with other colleagues.</li> <li>• Changing work targets or changing the way the work is given to your colleague.</li> </ul>	

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Society policies that may provide more information for colleagues and managers include:

- [Special Leave Policy](#)
- [Carers Policy](#)
- [Flexible Working Policy](#)
- [Managing Attendance Policy](#)
- [Mental Health and Wellbeing Policy](#)
- [Diversity and Inclusion Policy](#)

Additional guidance on supporting colleagues can be found in:

- [List of Common Workplace Adjustments](#)
- [Workplace Adjustment Line Manager's Best Practice Guide](#)
- [Line Manager's Best Practice Guide for Supporting Disabled Employees](#)

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