



Reasonable Adjustments Passport Guidance and Template



Name of employee:

Speciality:

GMC:



What is an 'Adjustments Passport'?

This 'Adjustments Passport' (or 'reasonable adjustment template') is a living record of adjustments agreed between a trainee, their Host organisation and Lead Employer.

The purpose of this Passport is to:

- Ensure that the trainee, Host and Lead Employer have a record of what has been agreed.
- Minimise the need to re-negotiate adjustments each time the trainee rotates, is re-located, or assigned a new supervisor within the organisation.
- Provide trainees and Host organisations with a structure for discussions about workplace adjustments.

This Passport can be reviewed and amended as necessary with the agreement of the trainee, Host and Lead Employer:

- At any regular one-to-one meeting.
- At a return-to-work meeting following a period of sickness absence.
- At Annual Review of Competency Progression (ARCP) panels.
- Before or after a rotation change, or after any change in circumstances for either the organisations or the employee.

Who should have an Adjustments Conversation?

Host Managers can offer trainees **whether known to have a disability or not**, the opportunity to discuss adjustments (an 'Adjustments Conversation') to identify whether an Adjustments Passport is required.

If trainees have regular sickness absence, long-term conditions or disabilities which impact them at work, you could offer to complete an Adjustments Passport, even if they already have adjustments in place.

Notes for managers

Host Managers are expected to be familiar with the Lead Employer's:

- Reasonable Adjustments Policy
- Attendance Management Policy



The Passport is a live document and should be reviewed regularly by both the trainee and Host manager and amended as appropriate. Remember, however, that expert advice from third parties (such as LE HR Advisory, Health Work and Wellbeing Advisers (HWWB), Access to Work, or IT specialists) may be needed before changes can be agreed and implemented.

Host Managers who need help in deciding whether or not an adjustment is 'reasonable' will find it helpful to discuss with the LE HR Advisory Team or use the support contacts available in the Reasonable Adjustment Policy.

An adjustments conversation allows the line manager to:

- Understand how a particular trainee's disability or condition affects them at work.
- Explain the needs of their speciality training and the business.
- Explain the Lead Employer's attendance and reasonable adjustments policy.
- Recognise signs that an employee might be unwell and know what the trainee wants you to do in these circumstances including who to contact for help.
- Know how and when to stay in touch if the trainee is off sick.
- Consider whether escalation to LE HR/HEE is required including whether the trainee should be referred for an assessment by an HWWB or another adviser to help both parties understand what adjustments could be effective.
- Review the effectiveness of the adjustments already agreed.
- Explain any change in the trainee's circumstances.

A sample decision flowchart is provided in this guidance to outline the most common route for arranging reasonable adjustments. This is guidance only and not a substitute for reading the policy.

STHK Lead Employer policies and approach are based on the **Social Model** of disability. We recognise that people are disabled by barriers in society and *not by their impairment or difference*. The social model helps individuals to recognise these barriers. This means that when having adjustments conversations, managers must focus on identifying barriers to full inclusion at work and making reasonable adjustments to remove the barriers.



The Social Model of Disability



The Social Model of Disability states that the oppression and exclusion people with impairments face is caused by the way society is run and organised.

What is “Reasonable”?

There is no standard benchmark for a reasonable adjustment, as every individual is different and different roles will have different core requirements. Five key things to consider when deciding whether an adjustment is reasonable are:

- **Effectiveness:** has the correct barrier been identified, and will the proposed adjustment help to remove it? Have you tested or trialled any adjustments if unsure?
- **Practicability:** can the adjustment be practically accommodated within the service or department as well as the trainees training? How will it work?
- **Disruption:** what, if any, disruption will be caused to the service? Disruption is expected, but is it undue disruption based on the needs of the employee and the service?
- **Cost:** what will it cost and what can we afford? This is to be considered by HEE, the Lead Employer and Host Organisation. Whether an adjustment is affordable is an organisational, not departmental decision. It is not acceptable to decline an adjustment request only based on localised budgets, and additional sources of support are available. A large organisation would be expected to afford more than a smaller organisation
- **Risk:** is there a Health and Safety risk to the adjustment for the person involved others, and has this been properly and objectively assessed?



Reviewing Adjustments

It is recommended that adjustments are reviewed at regular intervals to ensure that they are meeting the five key areas outlines above and continue to remove the barriers faced by the trainee. Some adjustments will need to be permanent, and managers should be sensitive in addressing this.

For example, it would not be sensible or reasonable to review whether a wheelchair user still requires an access ramp. However, it would be reasonable to review whether adjustments made for a new or fluctuating condition were appropriate.

Similarly, if there are changes to the service, or the host manager notices a change in the trainee's performance at work or feels these adjustments are not working, the trainee and the line manager should meet to discuss alternatives.

The trainee should inform the host manager if there are changes to their condition which have an effect on their work and/or if the agreed adjustments are not working or are no longer necessary. They should then meet privately to discuss any further reasonable adjustments or changes that should be made.

Notes on Defining Disability

While Disability is clearly defined in the Reasonable Adjustments Policy, the purpose of an *adjustments conversation* is to provide an opportunity to discuss circumstances and needs. The conversation is **not** to establish whether someone is Disabled or meets a 'threshold' as it is rarely necessary to know if someone is likely to be covered under the Equality Act 2010. All employees may need adjustments and support at some stage. The aim is to enable a person to do the job they were hired to do, to the best of their ability.

For example, a very tall person may need adaptations to their desk and chair, even though they are not disabled under the Equality Act 2010. A person with a disability may need a similar desk and chair adjustments related to their disability. Whether the Equality Act covers them should not qualify or disqualify someone from obtaining workplace adjustments.



Data and Privacy

An up-to-date copy of this form will be retained by trainee / host manager / Lead Employer for the purposes of ensuring that adjustments are recorded and reviewed. A copy of this form may also be given to a new or prospective host manager with the prior consent of the trainee. Requests for confidentiality that may impact the support or extent of reasonable adjustments should be discussed and noted.

Discussions around reasonable adjustments may involve trainee sharing personal and/or health related information. All conversations between trainees and their employer are confidential, and trainees accept that by consenting to giving their information it may be shared for the purposes of arranging and monitoring adjustments.

For the delivery and monitoring of adjustments this may include disclosure of limited information to the Lead Employer, HR Advisory Team, Estates and Facilities, Information Technology Services, HWWB, Access to Work and/or other external agency tasked with delivering the adjustments.

Health information is 'special category data' under the General Data Protection Regulation 2016 (GDPR) and managers must take additional precautions when recording and storing this information, in accordance with the StHK Lead Employer data policies.

- The Adjustments Passport should be saved securely using an agreed password, shared separately with the LE HR Business Partner & Advisory Team. Emails containing the document should not include personally identifiable data in the subject heading.
- Both host manager and trainee should retain an electronic copy of the Adjustment Passport. Updated versions should be shared and agreed promptly.

Word and Excel files can be password protected using the steps outlined at the end of this guidance.



Notes for trainees

The 'Adjustments Passport' allows individuals employed by the STHK Lead Employer to:

- Explain the impact of a disability or condition at work.
- Suggest adjustments that will make it easier for the trainee to do their job.
- Offer further information from the trainee's doctor, specialist, or other expert (where relevant).
- Request an assessment by HWWB, Access to Work, or another expert.
- Review the effectiveness of the adjustments agreed.
- Explain any change in the trainee's circumstances.
- Be reassured that the manager knows what to do if the trainee becomes unwell at work and who to contact if necessary.
- Know how and when the manager will keep in touch if the trainee is absent from work because of illness or a disability-related reason.

The Passport is a place where you can detail any information you would like to, about your health and disability as it relates to your work, and any support, changes or adjustments you and your line manager/trusted colleague have identified to enable you to carry out your role.

If you did not have your conversation with your line manager, you should make them aware of any support or changes you have agreed to put in place. This is because they will have responsibility for managing it.

These changes may be those you need all the time or are temporary or are to accommodate temporary fluctuations. This journal contains sections for you to provide details about yourself and your preferences in the workplace.



Frequently Asked Questions

Q. A trainee already has adjustments, which are working, do I need to complete this?

A. Yes. It formalises the arrangement and allows an opportunity to proactively review that the adjustments are still appropriate, necessary and meeting the trainees needs.

Q. A trainee has asked for an adjustment to care for their disabled partner, is this covered?

A. Not under the Reasonable Adjustments Policy, however we do provide support for carers under the Carers Policy.

Q. How do I know what is reasonable?

A. What is reasonable for one person, in one service, may not be reasonable for another. Please see the 'What Is Reasonable' advice in this guidance. If still in doubt you can contact the Lead Employer HR Advisory team, a member of the Equality, Diversity and Inclusion Team, or HWWB.

Q. A trainee has disclosed a complex disability but requires no adjustments at present, what do I do?

A. The trainee has trusted you with their health information and may still require support in the future. Please record a brief summary of your conversation on the passport, securely store it and share it with the trainee via email and agree an annual review (sooner if the trainee requests it).

Q. A trainee has disclosed a disability and asked for considerable adjustments, but I am not sure I believe them. What should I do?

A. Not all disabilities are visible, and non-visible disabilities can still have substantial impacts on people's lives. Managers are expected to trust that trainees are telling the truth and proceed with the discussions in good faith. However, it may be reasonable to recommend a referral to HWWB to get clarity if the request was substantial or there are complexities that need further advice.



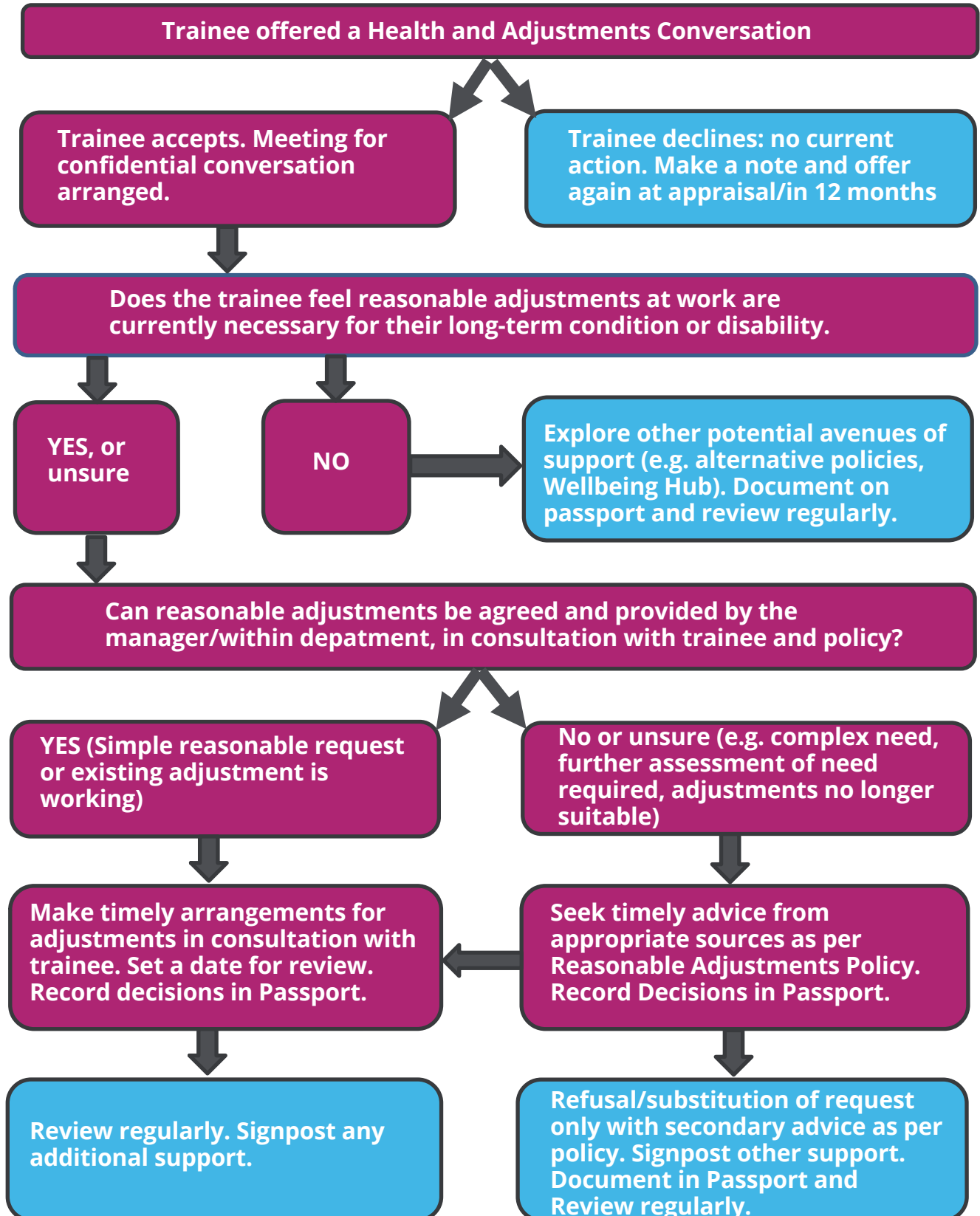
Q. A trainee has declined an adjustments conversation, but I know they have a condition or are experiencing barriers/difficulties which appears to be impacting them at work. What can I do?

A. You could let the trainee know that if they would prefer to discuss any potential barriers/difficulties with a trusted colleague present for support, or with an alternative manager, then it could be arranged. You could also let the trainee know that Lead Employer has a supportive reasonable adjustment policy and guidance in case they change their mind.

N.B. There is also a detailed FAQ section in the Reasonable Adjustments Policy.



Reasonable Adjustments Decision Flowchart





Adjustments Passport Template

Trainee: disability or health condition at work

The disability or condition has the following impact at work:		
<p>For example:</p> <ul style="list-style-type: none"> • Anything you may need support or help with doing. • Anything where you might need more time to carry it out. • Any information you feel would be helpful for your manager to know. • Any information regarding wellbeing, health or support that you feel is relevant to work, e.g., allergies, use of an epi-pen. • Things that make your role more difficult or to avoid. 		
I need the following agreed reasonable (refer to Access to Work agreement if relevant):	Date budget holder contacted if relevant:	Date Implemented:
<p>Include anything that helps or would help you to do your role. This could include any support, changes or adjustments you've already got in place or have had previously either temporarily or long term.</p> <p>For example: It could include the space you work in, e.g., a different chair; it could be the technology or equipment you use, e.g., two screens, different software; it could be the way you prefer to communicate, e.g., via email, face to face, in another language, via hearing loop.</p>		



Trainee: if a condition fluctuates

<p>When the trainee is feeling well (i.e. on a 'good' day), their disability or condition has the following impact on them at work:</p>
<p>When the trainee is feeling unwell (i.e. a 'not so good' or 'bad' day), the trainee experiences the following symptoms which may indicate they are not well enough to be at work:</p>

Trainee: Contact details in case of an emergency

If the trainee is not well enough to be at work, they are happy for the line manager to contact any of the following in the order of preference indicated below:

Lead Employer HR Business Partner & Advisory Team will update the Electronic Staff Record.

First contact	Second contact
<p>Name:</p> <p>Relationship to trainee:</p>	<p>Name:</p> <p>Relationship to trainee:</p>
<p>Name:</p> <p>Address:</p> <p>Telephone:</p> <p>Email address:</p>	<p>Name:</p> <p>Address:</p> <p>Telephone:</p> <p>Email address:</p>



Trainee: Additional Information

Use the space below to share anything you may not have covered in the previous sections. You can record the outcomes of your discussions with your line manager here.

Manager and Trainee: Keeping your passport up-to date

Date of Update	Action Plan		Date Action Plan Created	Passport Owner Signature Date	Line Manager Signature Date
	YES	NO			



Manager and Trainee: Action Plan

This Action Plan is designed to be a personal record of the outcome of reasonable discussions resulting in supportive changes or adjustments to enable the trainee to carry out their role to the best of their ability and aid development opportunities to be undertaken, where these have been identified. These actions may also help maintain a positive and healthy work presence, assist in a return to work or help achieve a positive work/life balance.

What changes or adjustments have been identified?	When are these changes expected to be put in place and for how long?	How will you know if these have been helpful?	Has it helped?	Date Agreed
	Identify who has been involved in the planning. Identify a potential timescale: <ul style="list-style-type: none"> • Less than 2 months • 2-5 months • 6 months or more 	What are you hoping the outcome will be? How will it be monitored?	What has been achieved? If it hasn't helped, do not continue. Review the reasons why and consider an alternative. Consider a review date	
			Review Date:	
			Review Date:	
			Review Date:	
			Review Date:	

Don't forget to save a copy securely (password protected) and set a reminder or appointment for review.



How to password protect a file?

The screenshot shows the Microsoft Excel interface. The 'File' menu is open, and the 'Info' tab is selected. The 'Permissions' section is visible, showing options like 'Protect Workbook', 'Mark as Final', 'Encrypt with Password', 'Protect Current Sheet', 'Protect Workbook Structure', 'Restrict Permission by People', and 'Add a Digital Signature'. The 'Encrypt with Password' option is highlighted. An 'Encrypt Document' dialog box is open, prompting for a password. The dialog box contains the following text:

Encrypt the contents of this file

Password:

Caution: If you lose or forget the password, it cannot be recovered. It is advisable to keep a list of passwords and their corresponding document names in a safe place. (Remember that passwords are case-sensitive.)

OK Cancel