

Disability Passport

Guidance for Managers and Employees

Welcome to Sandwell's Disability Passport Guidance.

The overall aim of this document is to provide information, practical hints and tips around the implementation of the Council's Disability Passport.

Page 2	What is a Disability Passport?
Page 2	Overview
Page 3	How to complete a Disability Passport
Page 3	Step 1- Arranging a meeting
Page 4	Step 2 – The meeting
Page 5	Step 3 – Occupational Health
Page 5	Step 4 – Outcome
Page 5	Step 5 – Sharing with the team
Page 6	Step 6 – Agreeing the document
Page 6	Step 7 – Review the document/adjustments
Page 6	Step 8 – When an agreement cannot be reached
Page 7	Example Disability Passport

1. What is a Disability Passport?

A disability passport is a voluntary document completed by the employee with the assistance of their line manager. It provides a framework within which to discuss the employee's disability and health, and what changes can be made at work to assist them. This also supports the employee to fulfil their full potential and do their job to the best of their ability.

Once agreed the document is signed by both parties to indicate that any reasonable and necessary adjustments will be made and upheld. This means that if the employee's line manager changes they do not have to explain their requirements again and that the current arrangements will not be withdrawn.

The passport is reviewed at regular intervals to check that adaptations remain appropriate and can be adjusted if the employee's needs or roles change. Alternatively, to check that the adjustments are still reasonable, and effective in enabling the employee to fulfil their role.

2. Overview

This guide is to assist employees and line managers when completing a disability passport.

In addition, managers should familiarise themselves with '[Employees with Disabilities, Manager's Safety Guide, Checklist and Action Plan](#)'. This is a guide produced by Sandwell Council's Health and Safety Unit.

The disability passport should be completed in a way that employees can see that their input and honesty are valued. It should also build in review dates so that both parties can propose alterations when their needs change. However, the most important element of the process is the conversation behind the document. So, the next few pages have tips and pointers for employees and line managers to get the best from their meeting.

It is likely that adjustments will fail if they are not accompanied by a supportive, positive attitude from colleagues and managers. For the disability passport meeting to go well, employees must feel able to be open and honest about their disability and health.

Similarly, they should feel comfortable enough to share details of their situation with their line manager and also their colleagues (if necessary). They should be able to expect to be treated with dignity and respect, but not expect people to "just know" every aspect of their particular condition or what will help.

Filling in the passport allows the employee to feel valued and gives them a platform to speak frankly about their situation. It allows the line manager a chance to ask questions and gain an understanding of their employee's impairment in a safe environment for both parties.

The passport can be used to document:

- A procedure for if the employee becomes unwell, including preferred contact(s).
- Behaviours to look out for that may indicate that their condition is declining, or an episode of illness is beginning.
- Situations that can trigger or exacerbate the disability or condition and how these can be minimised.
- Recommendations from Occupational Health.
- The document assists in beginning conversations about disability and may be used by the employee to request an OH assessment if they haven't had one already.

The Law States

The Equality Act 2010 is the legislation that details employer's duties to make "reasonable adjustments" for people who are disabled.

Someone is disabled when they have a physical or mental impairment that has a 'substantial' and 'long-term' negative effect on their ability to do normal daily activities – this is a legal, rather than a medical, definition.

Under the Equality Act, positive effects of treatment are not considered. For example, someone who suffers chronic pain and meets the criteria of being disabled should still be considered as disabled even if they take medication that greatly alleviates their symptoms.

Reasonable adjustments are anything that removes barriers to allow disabled people the best opportunity to do their jobs.

However, when deciding what adjustments to make, the line manager, should objectively consider what is "reasonable" in terms of the role, length of contract, cost of implementation, size and resources of the organisation. Examples of adjustments, can include:-

- Equipment – such as voice activated software, an ergonomic mouse.
- Changes to work patterns – such as shift patterns, working from home/nearer home.
- Changes to the workplace – such as automatic doors, altered lighting.
- Training – to educate colleagues and change attitudes.
- Redeployment – which means moving to another more suited role that becomes available, when the employee can't continue in their current role.

Sandwell Council recognises that some employees with disabilities may not have a formal diagnosis or assessment, and while they might not currently meet the definition of the Equality Act 2010, this does not preclude them from accessing this scheme.

3. How to complete a Disability Passport

Step 1 – arranging a meeting

Employee – The employee should familiarise themselves with the policy and guidance and establish whether this scheme would be beneficial for them.

If so, the line manager should be approached to arrange a meeting.

The employee will need to think ahead about what they want to say – It is advisable that they write some notes to bring with them if that helps. The next sections of this guide will help the employee structure those notes.

If the employee is currently absent from work due to sickness, they may wish to consider completing the disability passport ahead of their return.

If the employee feels they need longer to prepare for a meeting, they can ask for it to be rearranged. – They shouldn't feel that they need to put in hours of preparation.

Line Manager – When the line manager receives a request from an employee who is interested in this scheme, they will firstly explain how the process works, and how they feel it could work for

the employee. They will explain the advantages, in that they won't have to repeat the details of their requirements to any future managers they have. This will be detailed in the document.

Consider if the employee has seen Occupational Health, and if not, think whether it could be beneficial, then suggest this is arranged before the meeting. (Follow the [OH management referral process](#) to obtain a report from a medical professional containing recommendations – if any).

Step 2 – The meeting

Line manager

The line manager should explain what the document's purpose is, and that it should be completed jointly. The employee should have seen the guidance already.

Line managers are not expected to know all about their condition or impairment – and it can be a hindrance rather than a help to start applying medical knowledge here.

The manager should understand the employee's situation and see if together they can reach an agreement that benefits them, the team and the customer. Here are some points to cover to make the employee feel reassured:

- Confidentiality – Where the document will be stored and who can access it.
- Concerns – Make sure the employee has an opportunity to highlight things that may be worrying them about the meeting. They may also worry about wider implications of completing the passport.
- Own Expert – The manager should explain to the employee that they are not here to make assumptions, and that they are wanting to learn from them about how their impairment affects their working life.
- Terms – Everyone has different ways of referring to their circumstances. They may or may not consider themselves to be disabled, for example it is good practice to use their preferred terms.

The passport should be completed together, the line manager may want to make notes of key points as the employee talks and refer to them later.

Any notes made should be treated as sensitive and confidential.

Invite the employee to explain in their own words. They should do most of the talking here, although the line manager may input to prompt them if they are stuck or to clarify.

The line manager must let the employee put forward their suggestions first. If the employee is daunted by the question, the line manager may wish to prompt them using their knowledge of what is possible.

Failing this, try and find a third party who can assist – a work colleague or TU representative.

If at this stage more information is required, make sure the meeting ends with an agreement on who will do what, by when. This can be recorded in the 'awaiting further information' section on the form.

Employee

Employees often feel very defensive when they have a meeting about their disability and health. It is also natural for them to look to their manager to have the answers.

The employee is the expert on their condition(s). They probably have coping mechanisms in and out of work already – They should show their manager how they can meet the duties of their role, and have solutions already. When they don't have solutions, they will need to work with their manager to work out a plan, consulting third parties if required.

The meeting is focused on the employee's work life but may touch on other areas. If there is something that they want to keep confidential and omitted from the passport, they will need to let their manager know at the outset.

Line managers don't have all the answers. It is so much easier to make progress when the employee speaks openly and asks questions. Questions from the manager should be seen as a positive – they will want to understand, and this is better than them assuming. They should be prepared to educate their line manager about their condition, if they want to get the best outcome.

As a starting point the following could be considered:

- The nature of the disability and health issue including medical name if applicable eg. Fibromyalgia.
- How long the employee has had this issue and when, and if, they were diagnosed.
- What the symptoms are day to day, and how they are managed.
- If the employee has a fluctuating condition, how often they have episodes and what, if anything, triggers them.
- Any existing aids or equipment eg. walking stick.
- How the disability and health issue impacts on their mood.
- Any side effects of treatments.

If the employee is not sure about an element of the agreement or how the completed document will be used, then they must ask for some time to look over it. They may also need to consult with their TU representative if necessary.

Step 3 – Occupational Health

If during this process a referral to Occupational Health is considered helpful, an appointment should be arranged with an agreement to meet again to look over the Occupational Health report together before continuing with the process. Keep engaged with the disability passport process and ensure that a follow up meeting is arranged.

Step 4 – Outcome

At this point, there will be a completed disability passport, which details what is practicable, reasonable in the circumstances, and what is likely to be effective. If there is uncertainty about how to take an adjustment forward, detail who will look in to this and when.

Make sure that all adjustments are identified as either time limited, temporary or ongoing.

Step 5 - Sharing with the team

The meeting should determine if the employee wishes to share details of their situation with their colleagues, it must be made clear to them that their fellow employees must respect the individual's privacy. They shouldn't under any circumstances share these details with anyone outside the team. (Unless the employee gives consent to do so).

Unless there is potential risk due to the nature of the impairment, choosing to disclose is up to the individual. It may be that once adjustments are made and the process is shown to have value, the employee becomes willing to share more widely.

Step 6 - Agreeing the document

Once adaptations have been agreed, the document is signed by both parties to indicate that the adjustments will be made and upheld. This means that if the employee's line manager changes they do not have to explain their requirements again.

At this point, the document should be attached to the employee's HR record. This will then be available to Human Resources employees, and any new managers who the employee reports to in the future, as appropriate.

Employees should ensure that any copies of the passport that they retain, become their responsibility and should be stored in a safe and secure manner.

Step 7 – Review the document/adjustments

The document will be reviewed every 12 months, or if the employee initiates an earlier review. Examples could include:

- The disability or health condition changes
- Personal circumstances change
- Job requirements change
- A change of post
- A change to the working environment

This is a good opportunity to check the progress of implemented adjustments and follow up as required. It is also a chance to assess how effective adjustments are once they are in place. If adjustments aren't working, then they can be removed, and other options considered.

There are also opportunities to raise any issues during other one-to-one meetings between the line manager and employee.

Consider if there is anything in the future that could influence the timeline for review e.g. For the employee – an operation; for the organisation – a change to services. If there is, factor that in.

Step 8 – When an agreement cannot be reached

Where a manager is unable to agree to a requested adjustment, they should detail why this is the case. This may include:

- Cost of implementation
- Needs of the service
- Difficulty in obtaining equipment

Managers should be aware that in refusing an adjustment, they need to have regard to their obligations under the Equality Act 2010. It is recommended that before refusing an adjustment, further advice is sought from HR.

This guidance was developed in conjunction with Sandwell Council's Occupational Health Unit, the Health & Safety Unit and its recognised Trade Union colleagues.

EXAMPLE - Disability Passport

Section 1.

Employee Name: *Benjamin Barker*

Manager's Name: *James Arnold*

Date of meeting: 09/10/2019

Effective From: 09/10/2019

Awaiting further information before completion (details):

.....

Section 2.

Employee Adjustment Request(s)	Adjustment Approved Y/N	Manager's Comments
<i>Due to a collapsed vertebra, I suffer with lower back pain when sitting for long periods. Therefore, a later start time would be beneficial, to reduce the amount of time I am sitting in traffic.</i>	Yes	<i>I am happy that the service we provide can still be delivered efficiently, with Ben starting work later, and therefore finishing later. 10am – 6pm</i>

Section 3.

OH Adjustment Recommendation(s) (If any)	Adjustment approved Y/N	Manager's Comments
<i>Adjusting the employees start time in the morning, may alleviate symptoms following the collapsed vertebrae injury.</i>	Yes	<i>As above</i>

Section 4 –

I consent for this form to be retained on my Human Resources record, and I am aware that this will be visible to my current line manager and any future line managers.

Signed (Employee): *Benjamin Barker*

Signed (Line Manager): *James Arnold*

Print Name: BENJAMIN BARKER

Print Name: JAMES ARNOLD

Date: 09/10/2019

Date: 09/10/2019

Employee Number: 15823

Date of Review: 09/04/2020

Employees should ensure that any copies of the passport that they retain, become their responsibility and should be stored in a safe and secure manner.

Section 5. Reviewing the document

The passport and agreed reasonable adjustments should be reviewed every 12 months.

Further reviews may be necessary at the employee’s request, or if there are any changes to the employee’s duties or condition/situation.

The following table is used to keep a written record of when the passport is reviewed and/or amended.

Review Date	Reason for Review	Details of Adjustment	Employee Signature	Manager’s Signature

Section 6 – Optional Additional Information

Does the employee have a **Personal Emergency Evacuation Plan**? If yes, please provide details: -
N/A

Emergency Contact:

Name: Edna Barker

Relationship: Wife

Home Phone Number: 0121 556 4499

Mobile Phone Number: N/A

Medical Contact (If applicable)

Name: N/A

Relationship: N/A

Home Phone Number:N/A

Mobile Phone Number: N/A

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