Work & Wellness Document

Work & Wellness Document Template produced by AbilityRE C.I.C

Last Review DatE: 4 July 2023

# **Contents of the Work & Wellness Document**

# Document Owner, Line Manager & HR Representative information – Page 2

# Your Health & Wellness information – Page 3

# Agreed adjustment details – Page 5

# Adjustment review record – Page 6

# Agreed alterations to adjustments – Page 7

# Keeping in touch, emergency contacts & personal emergency evacuation plan – Page 8

# **Guidance**

# Purpose of the work & wellness document – Page 12

# Guidance notes & frequently asked questions – Page 14

# References & recognition – Page 19

Document Owner Information

|  |  |
| --- | --- |
| Full Name |  |
| Employee Number/ Payroll Number |  |
| Team/Department/ Service Line |  |
| Signature |  |
| Date |  |

|  |  |  |
| --- | --- | --- |
| **Line Manager and/or HR Team Member Information** | | |
| Line Manager Full Name |  |  |
| Line Manager Team / Department / Service Line |  |  |
| Line Manager Signature |  |  |
| HR Representative Full Name |  |  |
| HR Representative Signature |  |  |
| Date |  |  |

Health & Wellness information

|  |
| --- |
| My Health and Wellness Information |
| This section is for you to give any details you wish to share with your employer/line manager about your health and wellness. The below section headers are for your guidance only and do not all need to be completed. Please use the areas most appropriate for you. |
| Nature of my disability, impairment, neurodiversity, long-term health condition, mental ill-health or other condition or circumstance. |
|  |
| Challenges or barriers this creates in my work |
|  |
| Things that can help me be effective include: |
|  |
| Do you require a Personal Emergency Evacuation support plan (PEEP)? |
| YES (If yes, please ensure a copy of the personal emergency evacuation support plan (PEEP) is appended to the back of this document)  NO |
| Other details/comments I feel are relevant |
|  |

Adjustment Details

|  |  |  |
| --- | --- | --- |
| Adjustment | Adjustment Description | Responsibility for Implementation and Target Date |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

(Add rows as needed)

Adjustment Review Record

|  |  |  |
| --- | --- | --- |
| Review Date | Individual Signature & Date | Employer Signature & Date |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

(Add rows as needed)

Record of Alterations to Adjustments

|  |  |  |
| --- | --- | --- |
| Description of Changes agreed | Individual Signature & Date | Employer Signature & Date |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

(Add rows as needed)

Keeping in Touch, Emergency Contacts & Personal Emergency Evacuation Plan

* Emergency Contacts & Personal Emergency Evacuation Plan

Keeping in touch

If the employee is absent from work on sick leave or for a reason relating to their disability of condition for more than [XX] days and have followed the usual procedures for notifying the organisation of their absence, the line manager will keep in touch in the following way:

|  |  |
| --- | --- |
| Who will contact whom? |  |
| How will contact be made? | (e.g. email, telephone, text, letter) |
| How often? | (e.g. example, daily, weekly, monthly) |
| When? | (e.g. preferred day and time, or, to be agreed via email on ad-hoc basis?) |

Agreed conversations while the employee is on sick leave

|  |
| --- |
| These are the topics the employee and line manager have agreed to discuss when keeping in touch: |
| Examples include How the employee is feeling; What the line manager can do to help; Current work; Planned phased return to work; Return to work date. |
|  |

Contact details in case of an emergency

If the employee is not well enough to be at work, or they are taken ill at work, they are happy for the line manager/HR team member to contact any of the following in the order of preference indicated below:

|  |  |
| --- | --- |
| First contact  Name:  Relationship to employee: | Second contact  Name:  Relationship to employee: |
| Address:  Telephone:  Email address: | Address:  Telephone:  Email address: |

PEEP - Personal Emergency Evacuation Plan

[Organisation] to insert/attach the agreed PEEP document here if one is required for the owner of this document

|  |
| --- |
| Document Guidance Notes |

Purpose of this document

This is **your** Work & Wellness Document.

This document aims to support **you** in your career in the Real Estate and Built Environment Sector.

It is to allow you to detail the support needs, accommodations and/or adjustments that would help you to achieve your full potential, as well as note any preferred working or communication styles.

This document is designed to be used by **anyone** who feels that they may need, or would benefit from, some additional support at work. Examples include, but are not limited to:

* A person with an impairment, disability, neurodiversity, mental health condition or long-term health condition.
* A person who is pregnant, breast feeding, or has parental or caring responsibilities
* A person who observes religious festivals or daily prayers
* A person who is undergoing ongoing medical treatment

Please note that you are not required to have a formal diagnosis to request a workplace adjustment. If you do have a diagnosis, there is no obligation to share this information with your employer, however it can benefit the adjustments process if you do. There is further information about this in the FAQ’s section and available via the links at the back of the document.

The document can be initiated by the individual or the employer but is **owned** by the individual.

This document can be taken by the individual to a new team; or shared with a new line manager; or new potential employer – but there is no obligation on the individual to do so. The information contained is personal, confidential, and owned by the individual and should never be shared internally or externally without their express consent.

The document is designed to be a ‘working document’. It should be reviewed with your employer annually as a minimum; however, the following points should be considered:

* When initiating new accommodations or adjustments, they should be reviewed initially after a couple of weeks, and then again after circa 3 months to review effectiveness and be refined as needed.
* Whilst the document should be reviewed annually as a minimum, either party may request a review at any time should your personal situation, condition, diagnosis OR your job role, job requirements, place of work or working environment change.

Agreed changes to accommodations or adjustments should be documented on page 8.

Guidance Notes & Frequently Asked Questions

Guidance Note for employers and line managers

According to government statistics, around 22% of the total UK population have a disability (circa £14.6 million people). 80% of those disabilities are not visible, and 78% of those disabilities will be acquired during adulthood, or to put it another way, during an individual’s working life.

Around 1 in 7 people are Neurodiverse, as many as 50% of those will not be aware of their neurodiversity or have a formal diagnosis.

About 15 million people in England alone have a long-term or chronic health condition.

Approximately 1 in 4 people in the UK will experience mental ill-health each year.

For these reasons, it is vital that employers and line managers are equipped to support their employees with adjustments or accommodations that support them in their day-to-day work and allow them to reach their full potential.

It’s against the law for employers to discriminate against an individual because of a disability. The Equality Act 2010 protects the individual in multiple areas including:

* Application forms
* Interview arrangements
* Aptitude or proficiency tests
* Job offers
* Terms of employment, including pay
* Promotion, transfer, and training opportunities
* Dismissal or redundancy
* Discipline and grievances

An employer has a legal obligation to make ‘reasonable adjustments’ to avoid an individual with a disability being put at a disadvantage compared to non-disabled people in the workplace. For example, adjusting working hours or providing equipment or training to help the individual performing the job role.

This document should be reviewed regularly (annually as a minimum, or sooner

If there is any change to your employee’s job role and tasks, or condition or impairment) to check if the adjustments are still appropriate and effective for them. You may require external advice or consultation with an occupational therapy provider, adjustments provider, or similar, to complete or amend this document. The below section allows your organisation to list your established partners for accommodation & adjustment assessment and provision.

|  |  |
| --- | --- |
| Organisation specific SME contacts or providers | |
| This box is for employers to include any information to the standard template relating to their internal or external Health/Wellness/Adjustment experts. This can include, but is not limited to:   * Internal HR Contacts * Company Private Health Providers * Company Internal or External Occupational Therapy Providers * Other Internal or External partnerships, member organisations, governing bodies or charity partners who can support with workplace adjustments. | |
| [Insert Name and Purpose of service here] | [Insert Contact Details, and relevant organisation membership/access information to enable Line Managers or HR Personnel to utilise this service if appropriate.] |
| [Insert Name and Purpose of service here] | [Insert Contact Details, and relevant organisation membership/access information to enable Line Managers or HR Personnel to utilise this service if appropriate.] |
| [Insert Name and Purpose of service here] | [Insert Contact Details, and relevant organisation membership/access information to enable Line Managers or HR Personnel to utilise this service if appropriate.] |
| [Add rows as required here] |  |
|  |  |

Frequently Asked Questions

Am I obliged to disclose my diagnosis or medical information to complete this document?

No. You are not obliged to disclose information about your disability or health condition. Some people choose not to due to concerns about the potential impact on career progression, or manager or team perception. However, many employers are now encouraging employees to ‘self-identify’, so that they can understand the overall make-up of the organisation and where they need to invest and improve. It can also enable the employee to support individuals more effectively. It is entirely your choice.

Why complete a Work & Wellness Document?

This document allows you to discuss and agree with your employer adjustments and accommodations that will support you in your day-to-day work and enable you to achieve your potential. Adjustments are not a ‘one time then fixed’ issue, they should be regularly reviewed to ensure that they are still supporting you and that nothing better has become available. The document also allows you the choice of sharing this information with any new line manager or HR team member if you change team or get a new job (although your new employer may use a different document format or methodology for documenting adjustments). The individual is the owner of this document, and it should not be shared internally or externally without their express consent – even if they change job role or team.

What can this document be used for?

This Work & Wellness Document can be used to document any agreed adjustment or accommodation for an employee. Adjustments most frequently occur in relation to disability, neurodiversity or mental or physical health conditions; however, this does not need to be the case. This document can be used to document accommodations required to support any employee personal requirement or circumstance, including (but not limited to): accommodations made/understanding required around an individual’s ethnicity, religion, gender, age, parental or caring situation, or health and wellbeing needs.

It should also be noted that adjustments or accommodations can be temporary, to support an individual through a specific period or challenge, or permanent. This document can be used in either circumstance.

What is the process for completion?

The document can be initiated by the individual or the employer but is **owned**by the individual.

An individual may use this document to note down thoughts or challenges they are facing within their workplace. They may also note down any ideas they have around support, adjustments or accommodations that would benefit them. The individual should not be expected to provide solutions, as they may not be aware of the types of accommodations/adjustments that could be available to them. The individual can then use this document to initiate a conversation with their Line Manager, HR Representative, or other appropriate person within the business who can then support through to completion and implementation of adjustments.

An employer may use this document, either if an employee requests an accommodation, or if it is noticed that an employee is experiencing challenges with aspects of their work. A line manager, or HR representative, is not a medical professional and therefore conversations should focus on the nature of the workplace challenge, and how the employee can be supported with this specific challenge. Line managers or HR representatives may also signpost employees towards other potential areas of support, such as the company Employee Assistance Programme, private health policies, occupational therapy or other external adjustment, advice or support services. Employees and Employers can also benefit from advice and financial support for adjustments through the UK Government’s ‘Access to Work’ Scheme (link at the back of this document).

How should it be maintained?

The document is designed to be a ‘working document’. It should be reviewed with your employer annually as a minimum; however, the following points should be taken into account:

* When initiating new accommodations or adjustments, they should be reviewed initially after a couple of weeks, and then again after circa 3 months to review effectiveness and be refined as needed.
* Whilst the document should be reviewed annually as a minimum, either party may request a review at any time should your personal situation, condition, diagnosis OR your job role, job requirements, place of work or working environment change.

What if the adjustments don’t help, or it isn’t feasible to implement necessary adjustments?

It is important for both employee and employer to remember that the adjustments process is an ongoing process. If a suggested accommodation or improvement does not have the desired impact, it should be reviewed and amended as appropriate until it works well for both parties.

It is worth noting that adjustments made without relevant supporting training (e.g. on technology or coaching) are significantly less likely to achieve the desired result than adjustments made alongside appropriate training or coaching.

It is also worth noting that taking a standardised one size fits all approach to Adjustments is significantly less effective than taking an individually tailored approach, and results in significantly improved staff retention rates.

Employers wishing to read more about this could review the Microlink/BDF Great Big Workplace Adjustments Survey (link in the references page).

Where can I find further information/resources?

* UK Government online pages relating to Access to Work scheme: <https://www.gov.uk/access-to-work>
* UK Government online pages relating to Disability Rights of the individual: <https://www.gov.uk/rights-disabled-person/>
* Equality Advisory Support Service (EASS): <https://www.gov.uk/equality-advisory-support-service>
* Disability Rights UK: <https://www.disabilityrightsuk.org/>
* Advice Now: <https://www.advicenow.org.uk/>
* Citizens advice: <https://www.citizensadvice.org.uk/>
* Business Disability Forum (If your organisation is a member): <https://businessdisabilityforum.org.uk/>
* Disability: IN (If your organisation is a member): <https://disabilityin.org/>
* Microlink & BDF Great Big Workplace Adjustments Survey: <https://businessdisabilityforum.org.uk/gbwas-what-did-people-tell-us/>

References & Recognition

Recognition

AbilityRE C.I.C. would like to thank to our Strategic Partners who have supported this work.

* Gerald Eve LLP
* Knight Frank LLP

A black and white logo

Description automatically generated with low confidenceA red and white sign

Description automatically generated with low confidenceLogo, company name

Description automatically generated

References

AbilityRE are a volunteer-led non-profit organisation aimed at promoting Diversity, Equity & Inclusion for people with disability, neurodiversity, mental health conditions or long-term health conditions. In producing this document, we have utilised the following freely available materials.

* UK Government online pages relating to Disability Rights of the individual: <https://www.gov.uk/rights-disabled-person/> - (Feb 2023)
* UK Government online pages relating to the Access to Work Scheme:   
  <https://www.gov.uk/access-to-work> - (Feb 2023)
* UK Government online pages relating to Health Adjustment Passports, [Department for Work and Pensions](https://www.gov.uk/government/organisations/department-for-work-pensions), Published 28 July 2022, Last updated 23 December 2022: <https://www.gov.uk/government/publications/health-adjustment-passport#:~:text=The%20Health%20Adjustment%20Passport%20can,work%20or%20moving%20into%20work> – (Feb 2023)
* UK Government, Disability Confident and CIPD: Guide for line managers on employing people with a disability or health condition, [Department for Work and Pensions](https://www.gov.uk/government/organisations/department-for-work-pensions), Published 21 November 2018, Last updated 26 November 2020:   
  <https://www.gov.uk/government/publications/disability-confident-and-cipd-guide-for-line-managers-on-employing-people-with-a-disability-or-health-condition> - (Feb 2023)
* The Royal College of Nursing, RCN Health Ability Passport:   
  <https://www.rcn.org.uk/Get-Help/Member-support-services/Peer-support-services/Health-Ability-Passport> - (Feb 2023)
* Reasonable Adjustments Disability Passports 2019 WIP5, Published by TUC (Trade Union Congress) and GMB Union: <https://www.tuc.org.uk/sites/default/files/Reasonable_Adjustments_Disability_Passports_2019_WIP5%20%28logo%20change%29%20secure.pdf> – (Feb 2023)
* NHS Health Passport, NHS Employers (2022), NHS health passport: <https://www.nhsemployers.org/publications/nhs-health-passport> - (Feb 2023)
* University and College Union, Reasonable Adjustment Passport (April 2019): <https://www.ucu.org.uk/media/10225/Reasonable-adjustment-passport/pdf/ucu_adjustment_passport_apr19.pdf> - (Feb 2023)
* University and College Union, Making Adjustments Work (April 2019): <https://www.ucu.org.uk/media/10226/Making-adjustments-work-adjustment-passport-policy/pdf/ucu_adjustment_passport_policy_apr19.pdf> - (Feb 2023)
* Unison Reasonable Adjustments pages including, Proving Disability and Reasonable Adjustments (October 2022) and Unison Reasonable Adjustments Bargaining guide (2019) - <https://www.unison.org.uk/search/reasonable+adjustments/> - (Feb 2023)
* Reasonable Accommodation Passports, Irish Congress of Trade Unions and Ibec (2022): <https://ictu.ie/sites/default/files/users/user319/Reasonable%20Accommodation%20Passport%202022_V4.pdf> - (Feb 2023)
* Kent Community Health NHS Foundation Trust Work and Wellbeing Passport: <https://www.kentcht.nhs.uk/wp-content/uploads/2017/01/Work-and-wellbeing-passport.pdf> - (Feb 2023)

A black and white logo

Description automatically generated with low confidence



Work & Wellness Document

Produced by AbilityRE with support from our strategic partners

Work & Wellness Document Template produced by AbilityRE C.I.C

LAST REVIEW DATE: 4July 2023