



The Queen Elizabeth  
Hospital King's Lynn  
NHS Foundation Trust

# Health and Wellbeing Passport Guidance Notes

## **Passport confidentiality agreement**

The information provided in the Health and Wellbeing Passport (or 'Passport') is confidential to the employee and their line manager and should not be shared with any other party without the written consent of the employee.

A copy of the Passport should be held by both the employee and their manager. All reviews and amendments should be documented on page 4 of the passport.

### **Purpose**

The purpose of the Passport is to provide a documented record of an individual's needs, which would allow them to function to their maximum capacity in a supportive environment, without prejudice or discrimination.

The Passport can be used for any member of staff who feels that they may need some additional support at work. For example: a member of staff with a disability or long-term condition; those who have caring responsibilities for a relative with a disability or long-term condition; parents with young children; staff who observe religious festivals or celebrations such as Ramadan or daily prayers; staff who are in the process of gender reassignment.

The Passport can be requested by the employee or offered by the employer but is 'owned' by the employee.

Completion of the Passport is voluntary, however all employees should be offered the opportunity to complete a Passport, which can be at any point during their employment.

The Passport contains details of reasonable adjustments agreed between the employee and their line manager, ensuring that the employee able to work to their full potential within a positive and supportive environment.

The passport will need to be reviewed on an annual basis; this may be alongside the annual appraisal process. It will also be necessary to review the Passport, and the employee should be responsible for initiating a review if:

- their disability or health condition changes
- their personal circumstances change
- their job requirements change
- they change post
- there is a change to the working environment.

A formal revision should be entered and signed by the employee and their manager or new manager as appropriate on Page 4 of the Passport.

If an employee does not feel able to disclose the full nature of a disability or health condition to their line manager or 'grandparent' manager, adjustments can be identified through a consultation with occupational health, which will make appropriate recommendations on the employees' behalf. Information on referring an employee to Occupational Health can be found on the intranet.

## **Why complete a Passport?**

This is a positive document for both employee and employer and aims to:

- Provide employees and their line managers with the basis for discussions about reasonable adjustments that may be needed
- Ensure that both parties, the employee and the employer, have an accurate record of what has been agreed
- Minimise the need to re-negotiate reasonable adjustments every time the employee changes jobs, is re-located, or assigned a new manager.

### **The Passport allows you, the employee, to:**

- Explain the impact of your personal circumstances on you at work
- For example, the impact of your disability at work, your caring situation, religious observances, etc.
- Suggest adjustments that you consider will make it easier to do your job
- Offer more information from your GP, specialist or other expert as appropriate
- Request an assessment by Occupational Health, Access to Work or another expert
- Review the effectiveness of adjustment/s provided
- Explain any change to your circumstances
- Be reassured that your manager will know what to do if you become unwell at work and who to contact if necessary
- Know how and when your manager will keep in touch should you be absent from work due to your personal circumstances.

### **The Passport allows you, the line manager, to:**

- Understand how your employees' circumstances might impact them at work
- To explain the needs of the business
- Recognise signs i.e. when your employee might be unwell and know what they would want you to do, including who you should contact for help
- Discuss how and when to stay in touch if your employee is absent from work

- Consider if your employee needs to be referred to Occupational Health or another adviser to help both parties understand what adjustments may be required
- Review the effectiveness and on-going relevance of the adjustment provided on a regular basis, including the impact on the employee and the service
- Ensure that the employee is aware of and is able to benefit from the Trust's commitment to the Two Ticks (Positive About Disabled People) accreditation.

## **Sections of the Passport**

### **Personal circumstances**

This section allows the employee to give a brief description of your personal circumstances (e.g. your disability, health condition, caring situation, religion) and, if appropriate, how long you have had a diagnosis or been in these circumstances. Space is also provided to describe the impact that your personal circumstances may have on you at work. Guidance is available in appendix 1.

### **Wellbeing at work**

This section allows the employee to describe how your disability, health condition or personal circumstances may affect you on a 'good day' or a 'bad day' at work.

If you have a disability or health condition, please use this section to describe any symptoms which may indicate that you need help or are not well enough to remain at work: (OH or access to work guidance if applicable).

If you are not well enough to remain at work and need support to get home or to medical assistance (e.g. your GP), emergency contacts can be recorded on Page 11 of the passport.

## Reasonable adjustments

A 'reasonable adjustment' is a change to remove or reduce the effect of:

- An employee's disability so they can do their job
- A job applicant's disability when applying for a job

The reasonable adjustment could be to:

- The workplace environment
- The ways things are done
- Get someone to help the employee or job applicant

## Formal assessments

Please use this space to tell us about any assessments by a trained specialist, specific to your disability / health condition or personal circumstances (e.g. Occupational Health / consultant) and dates completed:

## Reasonable adjustments

Please use this space to record any reasonable adjustments that have been discussed and indicate if the adjustment has been agreed with your line manager.

If an adjustment has not been agreed, your manager should provide information on the reason for rejection. (Guidance is available in Appendix 1 if required)

NB: If a reasonable adjustment of flexible working is agreed, the appropriate application for flexible working must also be completed, as directed in the QEH Flexible Working Policy, available on the intranet. A copy of this application must be kept with the Passport and reviewed in line with the policy.

## Keeping in touch

In accordance with the Attendance Policy and Procedure, the employee is required to contact their manager as soon as possible by telephone if they are unable to attend work due to ill health. Initial contact should be made by the employee.

On the first day of their sickness absence an employee must report their sickness absence by telephone to their line manager or department contact as soon as possible on the first day of absence but no later than two hours prior to the start of their shift or normal start time, being considerate of the impact that late notification will have on team members.

In addition, the manager is required to keep in touch with their employee on a regular basis (a minimum of every two weeks in the case of long-term absence).

Notably it is the responsibility of both the employer and employee to comply with keeping in regular contact to inform on updates relating to sickness absence.

A manager's contact with their employee should be carried out in a sensitive and supporting manner. If it has been identified as a reasonable adjustment that you have a carer as a named advocate, to support you when communicating with your manager, they can be named below.

The form on page 10 can be used to agree how often and with whom contact may be made.

Conversations while you are away from work may include:

- a. How are you feeling?
- b. Have you been to the GP/other specialist?
- c. What can the manager do to help?
- d. Current work
- e. Return to work date
- f. Planned phased return to work
- g. What are you able to do?

### **Emergency contacts**

If you are not well enough to be at work, and need support to return home, you can give details of named people you are happy for your line manager to contact to help.

Completion of this section is voluntary and can be left blank if you choose. However, if this section is completed, a copy must be sent to Human Resources to update your ESR record as necessary.

## Appendix 1: definitions, guidance and signposts

The impact personal circumstances may have on you at work (Page 5).

If you have a disability or long-term condition, you may wish to consider some or all of the following when you describe the impact that your disability or long-term condition has on you at work:

- Effect on co-ordination, dexterity, or mobility
- Effect on mental health (e.g. schizophrenia, depression, stress, severe phobia, anxiety)
- Effect on hearing, speech or visual impairment
- Learning difficulty (e.g. dyslexia) or speech impairment (e.g. stammering)
- Other physical or medical conditions (e.g. diabetes, epilepsy, arthritis, asthma, allergies, cancer, facial disfigurement, etc.)
- Ability to interact socially with colleagues
- The effect of particular working environments (e.g. open plan offices)
- Attending medical or counselling appointments. \*

### What do we mean by 'disability'?

The 'Social Model of Disability' suggests that disability occurs because of the way society is organised and that it presents numerous barriers which prevent disabled people from being properly involved in community life. This includes discriminatory attitudes, inaccessible services and information, and physical barriers, such as the design of buildings and public transport.

If your circumstances are not relating to a disability or long-term condition, you may wish to consider some or all of the following when you describe the impact that your personal circumstances have on you at work:

- Receiving phone calls from the person you care for or your child's school / nursery or being called away because of an emergency
- The mental distress of knowing that the person you care for is currently unwell and the impact on your concentration at work.
- Being late for work or poor timekeeping because of your caring or parenting
- Needing to accompany the person you care for to medical appointments \*
- Attending medical or counselling appointments yourself \*
- Needing a quiet space / time away from your work during the day to observe daily prayers
- Fasting during religious observances and the effect of fasting on your energy and concentration.

\* Where possible appointments should be made outside of normal working hours, or at the start or end of the day. Refer to the managing attendance policy for more information.

**You may wish to consider the following during discussions with your manager, when deciding on what adjustments may be required:**

- Flexible Working\* (e.g. flexible hours, working from home)
- Additional training
- Specialist equipment (e.g. IT, reading or writing aids, furniture)
- Seating or desk arrangements
- Allowing a guide or hearing dog into the workplace
- Disabled parking space
- Change in the nature and/or number of responsibilities.

\*QEH has a policy and process for applying for flexible working, available on the intranet.

Reasonable adjustments are a requirement under the Equality Act 2010, however it should be noted that it may not be possible for the organisation to provide all adjustments identified and that any adjustments identified by Occupational Health are recommendations.

Each potential adjustment should be reviewed with regard to business need / requirements and budgetary implications.

Please note that fraudulent use of the Work and Wellbeing Passport to obtain reasonable adjustments that are not required could result in disciplinary action, up to and including dismissal.

**HR Policies are there to provide information for employees and managers, some of these policies are:**

- Special Leave (e.g. carers leave)
- Flexible Working Policy
- Attendance Policy and Procedure (including sickness reporting)
- Stress Management in the Workplace Policy
- Equality, Diversity and Inclusion Policy
- Staff Perimenopause and Menopause Policy
- Dignity at Work (Respectful Resolution Pathway).

All the above, can be found on the Human Resources page on the intranet by following the links from the home page for Policies > Human Resources > Policies and Procedures.

**Access to work** is a government grant scheme which helps pay for practical support so you can do your job. You may be able to apply if you have a disability, health or mental health condition. The grant can pay for: specialist equipment, travel when you can't use public transport or a communicator at a



job interview. More information can be found at <https://www.gov.uk/access-to-work>

**Mental Health First Aiders** provide workplace support for a member of staff who is experiencing a mental health issue or emotional distress. They offer non-judgemental listening and guidance.

**Freedom to Speak Up Guardian (FTSUG)** We have a designated Freedom to Speak Up Guardian, who is supported by 22 Freedom to Speak Up Champions across the hospital. They are here to help you speak up. They are from different divisions, staff groups and areas of the hospital and they will act as role models for creating an open, honest and transparent culture. Information about the Freedom to Speak Up Guardian can be found in the Speaking Up Policy on our intranet page. Who can I tell > Speaking Up Policy.

**Staff Clinical Psychology** offers staff two full time staff members to support with any mental wellbeing needs. To find out more visit the staff intranet page > healthy lives > staff support.

**Support and advice for managers** is available through the Human Resources. For information on who the advisor for your Directorate or Service is, please refer to the Human Resources page on the intranet by following the link for Human Resources.

**Health and Wellbeing** services for staff, for more information please visit the staff intranet page > healthy lives.

**Equality Act 2010** can be viewed on, or downloaded from, the Governments Legislation website and guidance publications on the Equality Act 2010 are available through the governments gov.uk website

Specific Guidance documents that may be appropriate are:

- Guidance on matters to be taken into account in determining questions relating to the definition of disability
- Duty on employers to make reasonable adjustments for their staff

**Staff Networks** are in place to offer peer support to colleagues and managers, and information and signposting where appropriate. Contact information for each of the Staff Networks can be found on the staff intranet page home screen.