

LTB No. 352.24

6th November 2024

Dear Colleagues,

Business Recovery, Transformation and Growth Agreement – Workplace Adjustments and Health Passport

We are pleased to report that significant progress has been made by the Attendance Joint Working Group on the development of a workplace adjustment guide and for the first time in Royal Mail a Health Passport, something which is extensively used by other organisations and in particular the NHS.

The workplace adjustment guide will aid and direct Royal Mail Managers to implement reasonable adjustments for our members including carers, disabled members and non-disabled members who may have not met the definition of a disability. It will also allow for adjustments to be made for disabled members to apply for roles which may have previously been denied them as well being able to remain in work instead of having to leave the Business through ill health.

The Passport is a confidential document which can be uploaded via the “**this is me**” file in the RM My Peoples App by the individual and this will alert Line Managers automatically so they can engage and support the member.

The Passport can be used to highlight a disability, a neuro-diverse condition or any members caring responsibilities.

We believe it will be welcomed by the wider membership; it is fully in line with the Equality Act 2010, as well as being an important extension of rights to all members who may well be carers and our non-disabled members.

The introduction a passport fulfils a long-standing Conference Policy and Branches should look out for a launch of this initiative in early November.

Any enquiries in relation to this LTB should be addressed to Bobby Weatherall, Acting Assistant Secretary, email: khay@cwu.org or hmaughan@cwu.org

Yours sincerely,

Bobby Weatherall
Acting Assistant Secretary



Workplace Adjustments A Manager's Guide

To print or download a PDF of this document, click on the three white lines on the bottom left of the screen.



ROYAL MAIL GROUP

Workplace Adjustments Guide

Royal Mail is committed to considering and implementing appropriate workplace adjustments to support disabled colleagues to apply for and/or stay in work.

Royal Mail will also consider making workplace adjustments in a broader range of circumstances, such as where an employee has a health condition which does not meet the definition of a disability or where the employee has caring responsibilities.

This guide provides support for managers who need to consider workplace adjustments for colleagues. It provides a step by step process for managers to follow as well as useful contacts who can offer more support.

This guide:

- applies to all employees of Royal Mail Group Limited (including Parcelforce Worldwide);
- **does not apply to agency staff, contractors or self-employed individuals;** and
- is effective from XX XX XXXX.

This guide does not form part of any employee's contract and we may amend it at any time.

In this document, 'Royal Mail Group Limited' will be referred to as 'Royal Mail Group'.

Roles & responsibilities

- > The Chief People Officer (CPO) is accountable for the People Policy and its associated procedures and guidelines
- > The Head of HR Policy is responsible for developing and maintaining this guide
- > Managers are responsible for following this guide and supporting employees by considering, exploring, implementing and reviewing temporary or permanent workplace adjustments within their area of responsibility
- > Employees are responsible for communicating and liaising with their manager and providing any relevant documentation relating to the workplace adjustments process

Chief People Officer
XX XX XXXX

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Introduction

This guide covers our requirements as an employer to make reasonable adjustments in line with the Equality Act 2010 and also how we consider making workplace adjustments in other circumstances.



What are workplace adjustments?

Reasonable adjustments are changes or modifications that may be needed due to a disability to ensure a disabled employee/applicant is not placed at a disadvantage when compared to a non-disabled employee/applicant. Importantly, making reasonable adjustments ensures that disabled employees can apply for roles and remain in work.

We should also consider making workplace adjustments in a broader range of circumstances, such as where an employee has a health condition which does not meet the legal definition of a disability or where an employee has caring responsibilities. Workplace adjustments are changes made on a temporary or permanent basis to an employee's workplace or working arrangements.



This guide covers workplace adjustments and highlights some of the considerations you need to make. It also includes the actions required when an employee has a health condition/disability.

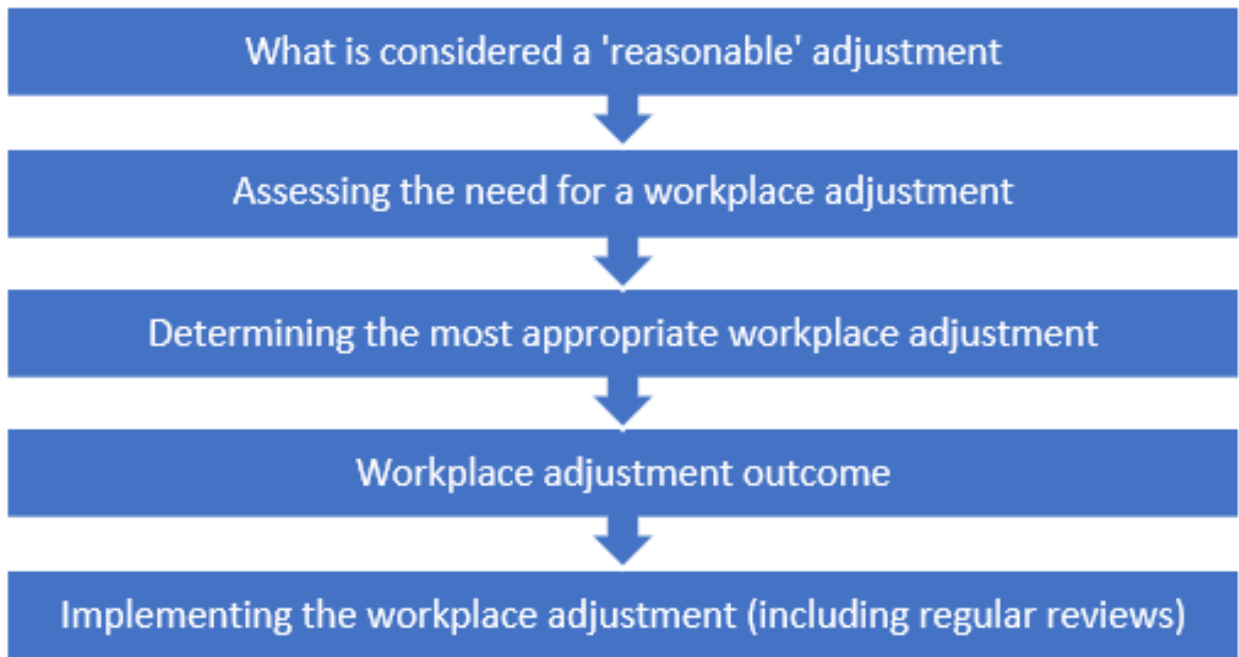
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Workplace Adjustments Process

You should use the Workplace Adjustments Process to support you when considering, exploring, implementing, and reviewing temporary **or** permanent workplace adjustments.

The diagram below outlines the process. Click on the relevant arrow for more information on each step.

To note: If a temporary adjustment is needed **following a period of absence**, you must follow the process outlined here in: Attendance - A manager's Guide.



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What is considered a 'reasonable' adjustment?



An adjustment could be one or a combination of the following (this list is not exhaustive):

- > Making adjustments to premises e.g., ramps, signers, visible fire alarm equipment;
- > Acquiring or modifying specialist equipment e.g., height adjustable desks, seating;
- > Flexible working hours e.g., for hospital appointments, physiotherapy, treatment etc.;
- > Altering job content, attendance patterns or work locations;
- > Altering assessment procedures e.g., providing more time;
- > Allowing more breaks and providing quiet spaces to remove distractions;
- > Communication in advance of any planned changes that could cause stress or anxiety;
- > Keeping walks and routes familiar;
- > Reducing workload or providing hybrid working;
- > A permanent or temporary change – if you are making a permanent contract change you must ensure the employee is made aware of the impact of changes to any terms and conditions, pay and benefits entitlements. Workplace adjustments that affect an employee's terms and conditions require their consent and agreement. You will also need to ensure that an Employee Change Request (ECR) has been submitted and is dated correctly; or
- > Considering flexible working arrangements which could include job share opportunities and term-time working (TTW) [click here for more information](#).

If you need support deciding whether an adjustment is reasonable, you should contact the People Case Advice Team (PCAT) on 0345 604 2783.



It is important to note that some of the above examples could also be workplace adjustments for those with health issues that do not meet the legal definition of a disability, or those with caring responsibilities e.g. changes to working hours, term-time working (TTW). You can find more detailed examples of workplace adjustments in the Appendix.

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Assessing the need for a workplace adjustment



Recognising the need for a workplace adjustment

As a manager, it is your responsibility to support employees with visible and non-visible (not obvious) health conditions/disabilities. An employee may be direct and open about their health condition/disability, but sometimes may not be forthcoming about needing support. Employees with health conditions/disabilities may choose to deny or conceal their condition, often as they fear being discriminated against or looked at differently.

Creating a culture of trust and a supportive environment can encourage employees to approach you if they need help and support. Making yourself available and building meaningful relationships with your team can help you recognise when someone in your team is struggling, e.g. signs such as a change in performance, more frequent absences, appearing withdrawn, upset or emotional or frequently arriving late to work.

For employees who may need an adjustment due to a health condition/disability, you may need to complete a disability risk assessment and/or seek Occupational Health (OH) advice, both of which will support you to explore appropriate adjustments; however, you do not need to do this for employees who need adjustments to accommodate caring responsibilities.

If the employee is an unpaid carer, they will voluntarily provide or arrange care for a dependant family member or someone living in their household who has long-term care needs of three months or more. Typically, the reason for care is due to illness, disability, neurodiversity challenges, mental health problems, or addiction. Someone who is a carer cares for people of any age, although in this context, caring extends beyond ordinary parental responsibilities for a dependent child or children. Carers themselves range across all age groups, with those under 25 known as Young Carers.

If you have noticed an employee needs support due to a health condition, disability or caring responsibility, you should arrange to meet with them to understand their individual circumstance.

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Assessing the need for a workplace adjustment cont ...

You can use the Passport Support form to guide your discussions with the employee, record notes, as well as any outputs from a disability risk assessment and/or OH referral. We have included a section as part of this guide on how to prepare and hold this meeting.

Meeting with the employee

Arrange to meet with the employee, explaining that you want to discuss any additional support they may need to carry out their role. This is not a formal meeting, so you do not need to send out a written invitation; you should speak with the employee and arrange an appropriate date and time to meet.



You should ensure the meeting takes place in an appropriate location (i.e. somewhere you will not be interrupted or overheard) and reassure the employee that the conversation will be confidential and that you will only share details where additional support is necessary, in line with our data principles.

The employee may wish to be accompanied by a Trade Union Representative or a work colleague, normally from the same work location.

During the meeting, you should explore all options that would help the employee to continue to work:

- Ask questions that focus on how the employee's health condition/disability impacts on their ability to carry out their role rather than the details of their condition/circumstances;
- Discuss the ways that the business can support them to carry out their role;
- If the adjustment is because of caring, ask them why they need an adjustment;
- Ask the employee for their suggestions on what adjustment(s) they believe would help them and how they want to be supported.

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You should always be sensitive and discrete to an employee's circumstances - these discussions are confidential.

You may be able to agree on a suitable workplace adjustment within this meeting. If this is the case, you should complete the Passport, noting the details of the workplace adjustment and discuss the next steps (i.e. implementing and reviewing the workplace adjustment). More guidance on this can be found in the section 'implementing the workplace adjustment, including regular reviews'.

If you are considering an adjustment due to an employee's health condition/disability, then you **must** consider completing a disability risk assessment and seek OH advice.

Completing a disability risk assessment

When exploring possible reasonable adjustments for employees with disabilities, you should consider completing the Disability Risk Assessment, which can be found on the "Person's Specifically at Risk" section of the Safety, Health, and Environment Management System (SHEMS) site. It will be particularly useful to fill out the Control Measures table as this will be the most relevant tool in determining a suitable adjustment. For example, a control measure for an individual with a hearing impairment would be to implement a visual warning for a fire alarm. If you need help completing the risk assessment, you should contact your safety advisor.

Seeking Occupational Health (OH) advice

Following the discussion with the employee, if it is not clear what workplace adjustments would assist, it may be appropriate to make an OH referral. This will help give you a better understanding of the employee's health condition/disability and the outcome report will highlight any recommendations of support best suited to the employee.



The employee must consent to the referral, fully understand why the referral is necessary and what is involved i.e. what questions should they expect. Please see the Occupational Health section of the 'Attendance – A Manager's Guide' document (page 37) here for support with making a referral.

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Determining the most appropriate workplace adjustment



After speaking with the employee, assessing their needs and considering all possible options, you will then need to determine the most appropriate workplace adjustment.

You should consider the following questions:

- › Will the adjustment enable the employee to better carry out their role?
- › Will the adjustment support attendance at work?
- › Is the adjustment practical?
- › How will the adjustment affect others in the workplace?
- › How will the adjustment affect the operation?
- › Is the adjustment sustainable?
- › Should the adjustment be temporary or permanent?
- › If temporary what timelines are agreed and why?



If you believe an adjustment may have a wider impact upon the rest of the team (i.e. resourcing arrangements), you may find it useful to discuss this with the union representative. Personal details should not be shared without the employee's consent.

Some adjustments may not be considered reasonable. For example, if the adjustment:



- › Would have a detrimental impact on our ability to meet customer demand;
- › Would have a detrimental impact on quality and or performance;
- › Would not work to remove the disadvantage to the employee or is not practical; or
- › It is not possible to re-organise work among existing colleagues.

All of the above examples should be fully explored. If you are unable to accommodate the adjustment, you should provide the reasons why so the employee understands how you have reached that conclusion.

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Workplace adjustment outcome

Appropriate workplace adjustment identified

Once you have determined the most appropriate workplace adjustment and if you have not already met and agreed this with the employee, you should arrange to meet with the employee. This meeting should be held in the same manner as the initial meeting i.e. in confidence and on an informal basis. Again, the employee may wish to be accompanied by a Trade Union Representative or work colleague, usually from the same work location.

During the meeting

You should explain the actions you have taken, the adjustments you have considered and the outputs of the disability risk assessment (if completed) and/or OH referral (if one was made). Ask the employee for their thoughts on the proposed adjustment; you must reach an agreement for an adjustment to be made before it can be implemented.



It may not be possible to reach agreement during the meeting and the employee may need to go away and consider what you have suggested and/or discussed. If this is the case, you should agree a suitable timescale for them to provide you with a response and arrange a further discussion.

Once an agreement has been reached, you should complete the Passport, noting the type of adjustment, the reason for the adjustment, the dates for the next review(s) and any other relevant details. You must share the Passport with the employee and both you and the employee should complete the confirmation section, confirming that all the details included within the document are accurate and the adjustment has been agreed.

If you cannot agree on a workplace adjustment following the meeting

If the employee does not agree to the adjustment you suggested, you may have to explore alternative options.

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If you cannot agree on a workplace adjustment following the meeting cont ...

This could include repeating the previous steps, looking into new suggestions from the employee or contacting the People Case Advice Team (PCAT) for advice. There is a section included within the Passport Support Form where you can note down any further suggestions given by the employee and/or the next steps.

Once you have considered alternative options, you should arrange a further meeting with the employee and try to reach agreement. Where it is not possible to identify any suitable workplace adjustments and you have exhausted **all possible options** you may have to consider redeployment.

Workplace adjustment not identified

If you have not been able to identify a workplace adjustment you should arrange a further meeting with the employee. During the meeting you should explain what adjustments you have considered and why they cannot be accommodated.

You should provide the employee with the opportunity in the meeting to highlight any other alternatives they may have. These should be explored in the same way as before and you may need to meet with the employee again.

If the suggested adjustments cannot be accommodated and you have exhausted **all possible options**, you may have to consider redeployment.

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Implementing the workplace adjustment, including regular reviews

Implementing the adjustment

Once the adjustment is agreed, it should be implemented as soon as possible however, this will be dependent upon the employee's circumstance and the type of adjustment involved.

If you have made an OH referral, the outcome report will highlight any recommended adjustment(s) (e.g. equipment) and may highlight that OH have already ordered it directly. If this is not highlighted in the report, it is your responsibility to ensure you review the recommended support and order any suggested equipment. If you are unsure on how to order the equipment or the equipment you require is not listed in the Reasonable Adjustment Furniture and Equipment guide, you can contact the Disability Support Team for support. This would also be the case if you are looking to action any employee GP recommendations.

If you are unsure on whether you can implement any recommended adjustment(s) (e.g. change of hours) please contact the People Case Advice Team (PCAT).



Additionally, the employee may utilise Access to Work, which provides funding to support the implementation of reasonable adjustments. For some services, employees must apply on their own; in these cases, you should signpost the employee to the Disability Support Team, who will be able to help them through the application process.

You should keep the employee updated to manage their expectations and to ensure they understand what is happening (e.g. if there is a delay and why).

If you have planned to implement the workplace adjustment but it is not happening immediately (e.g. equipment has been ordered but not yet received), you must be mindful that the employee may not be able to carry out certain tasks until the adjustments have been fully implemented.

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Reviewing the adjustment once implemented

It is important to have regular check-ins with the employee to ensure the adjustment has been successful and is enabling them to carry out their job responsibilities effectively.



(1) Temporary Adjustments - should be reviewed regularly; the frequency will depend on the adjustment being made and the reason, for example waiting for a procedure or a short-term caring need that will end at a certain point. You should set a date (or dates) for any review meetings and remove the adjustment(s) when they are no longer necessary. If it is clear that the adjustment(s) should be longer-term, you may have to consider making a permanent adjustment.

(2) Permanent Adjustments - should be reviewed more frequently when they are first introduced (every 1-2 weeks) to ensure the adjustment is successful. You can then extend the review period gradually. Once the adjustment(s) has been fully embedded, you should review the adjustment(s) with the employee every 12 months as a minimum to ensure it remains fit for purpose, is still required or whether it needs amending.

If an adjustment is not proving to be effective, you should arrange to meet with the employee to discuss alternative options/adjustments that might be more successful.

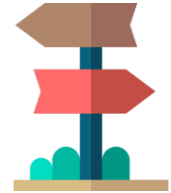


If the employee requires a reasonable adjustment due to a health condition/disability and you find there are no suitable reasonable adjustments in the employee's current work location, you may need to consider redeployment. This should only happen once **all other options have been exhausted**. You should contact the People Case Advice Team (PCAT) if you need further guidance and support.

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Support and useful contacts

Below are some services that you can access to support you through the workplace adjustments process.



People Case Advice Team (PCAT)

If you require any extra support or advice when deciding whether to make a workplace adjustment or what that adjustment could be, contact the PCAT team on 0345 604 2783, who will be able to provide support and advice throughout the process.

Health Partners (Occupational Health service provider)

Health Partners provide a range of services, including support with workplace assessments, equipment recommendations, ordering equipment and can provide guidance on adjustments for people with health conditions/disabilities, after an OH referral. Once an employee has given their consent and they are fully aware of why a referral is necessary, you can make an OH referral directly through the Health Partners Portal. People Case Manager (PCM) will guide you through the OH referral process and you can access additional guidance here: Attendance – A manager's Guide.

Access to work

Access to Work is a government scheme that provides funding for making adjustments to the workplace to help disabled employees stay in or return to work. For services where employees must apply themselves, you can contact the Disability Support Team, who can support the employee in completing their application. The Disability Support Team can be contacted at the following address: Disability.Support@royalmail.com.

Employee support

Make sure the employee is aware of the range of support available to them through the Help@hand service which includes the Wellbeing Employee Assistance Programme (EAP) helpline on 0345 266 5060. They can access more information about all the support available to them on our Wellbeing Hub (www.myroyalmail.com → "Your wellbeing") or via the "Your Wellbeing" tile on the People App.



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Support and useful contacts cont ...

Preventing and managing workplace stress

By managing workplace stress, you can support your employees and help to maintain a positive and productive environment that looks after everyone's wellbeing – including your own. Employees may feel stress when discussing their circumstances/condition with you. You can download the Stress Toolkit, which includes stress risk assessments to help you identify workplace stressors and reduce the impact.

Included within the Stress Toolkit is the Guided Conversation for Stress, which is an individual stress risk assessment that provides you with a structured template to support you through conversations with the employee. It also includes an action plan template that you can use to help prioritise the actions required to support the employee.

The guide Preventing and Managing Workplace Stress can also support you in spotting the signs of stress and having conversations with the employee.

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Appendix: Making workplace adjustments in practice

Below are some examples of workplace adjustments for certain conditions or scenarios. Please note that these are only general examples and are not exhaustive. It is essential to thoroughly evaluate all relevant factors when determining suitable adjustments for each situation.

If you require further advice or support, you should contact the People Case Advice Team (PCAT) on 0345 604 2783.



Hearing impairment

As a manager, it is your responsibility to ensure employees with hearing impairments are not put at risk from hazards on walks. Due to their impairment, they are more vulnerable to hazards such as dogs. An adjustment for this type of disability may be arranging to evaluate the walk assigned to the employee with a workplace coach to assess any potential hazards (e.g., dangerous dogs). These hazards should be reported onto PDAs. It is also important that the employee is assigned to the same walks to avoid any unexpected dangers. There is also British Sign Language (BSL) support available - you should contact the Disability Support Team to arrange this.

Dyslexia

This condition commonly affects an individual's ability to read, write and spell, which can be a vital part of their job responsibility. To avoid any mistakes, such as misreading addresses, it is reasonable and important to ensure they are assigned to walks they are familiar with. It may be useful for the employee to have several routes that they are familiar with in the event that they are asked to complete additional routes.

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Appendix: Making workplace adjustments in practice cont ...

Autism

People with autism can often be distracted by the environment around them - some factors can include noise, lighting, their workspace. Workplace adjustments for this condition could involve allowing them to have short breaks in a quiet environment or adjusting the lighting.

You should understand the factors that impact them and implement the appropriate adjustments. You should try to communicate with them regularly, especially if there are any upcoming changes that may impact them; changes that are made suddenly and unexpectedly can cause a build-up of stress or anxiety, which could impact on the individual's ability to work effectively.

Pre-surgery adjustments

To support employees leading up to any surgery, it would be reasonable to adjust their working hours to allow flexibility for them to attend hospital appointments and pre-surgery meetings.

You must also think about how the surgery will impact the employee and whether you will need to find someone to cover their responsibilities during their recovery. Delegating tasks that are more physically demanding beforehand will ensure a smoother handover and avoid prolonging any recovery.

Post-surgery adjustments

Individuals recovering from surgery may need adjustments to their workspace or to their work schedule. It would be reasonable to allow flexible working, giving them time in the day for any follow up hospital appointments/physiotherapy etc. It is also common for individuals to feel anxious and fatigued after an operation, so allowing more frequent breaks may be helpful to allow the employee to adjust.

Continued over the page →

Appendix: Making workplace adjustments in practice cont ...

If the surgery has affected their mobility, you may have to consider possible adaptations to the unit or work area. For example, fitting a ramp on the premises to allow wheelchair access or relocating an employee to the ground floor for easier access. A phased return to work may also be appropriate in some circumstances.

Caring responsibilities

Individuals with caring responsibilities may need adjustments to their work schedule or work location. If an individual were caring for someone at home or in a hospital/treatment centre, a suitable adjustment could include moving them to an office closer to that location. Balancing care duties with work can be overwhelming; reducing shift hours can reduce stress and provide the individual with greater flexibility to attend medical appointments as a carer.

For individuals with childcare responsibilities, a suitable adjustment may include reducing their hours of attendance or times of attendance on a temporary basis as they need to take their child somewhere for a defined period. In some circumstances, it may be appropriate to consider a flexible working arrangement, such as term-time working (TTW). More guidance on Flexible Working can be found in this guide: Working Arrangements Procedure.

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YOUR ROYAL MAIL PASSPORT



We deliver
MORE

EMPLOYEE NAME AND PAY NUMBER:



JOB ROLE:

WORK FUNCTION AND LOCATION:

WORKING HOURS:



OVERVIEW >>

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Your Passport is a place where you, with your manager, can record information about your disability, health condition or caring responsibility that you feel impacts you at work. Completing your Passport can help your manager understand how they can support you and where appropriate, implement any necessary workplace adjustments to help you carry out your role. Once the Passport is complete, it will move with you through Royal Mail and be available to your management team even if you change roles.

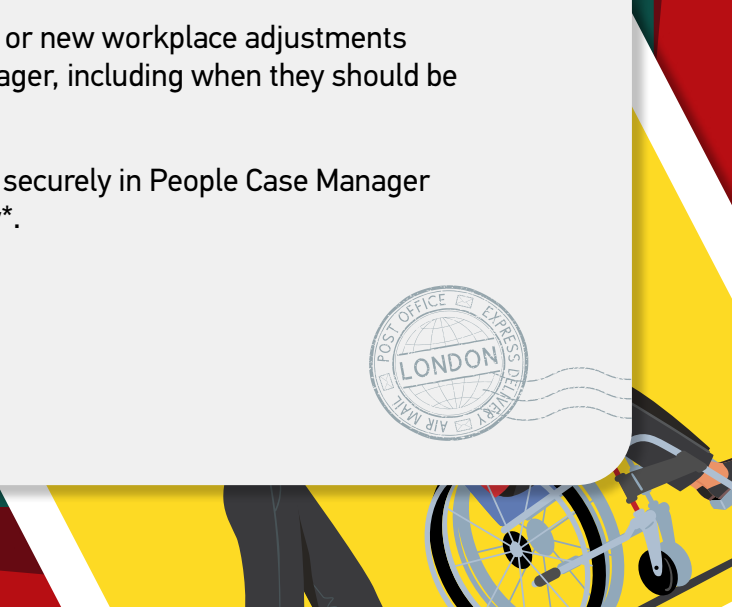
The Passport is also a place to record any existing or new workplace adjustments that have been agreed between you and your manager, including when they should be reviewed.

The Passport will be shared with you and retained securely in People Case Manager (PCM), in line with Royal Mail's Data Privacy Policy*.

* To be retained for the duration of employment plus seven years.



DISPATCHED



SECTION 1: DETAILS OF THE DISABILITY / HEALTH CONDITION / CARING RESPONSIBILITY

A. What do we need to know about your disability / health condition / caring responsibility?

- Do you have a medical diagnosis or any other information regarding your health that you feel would be helpful for your manager to know about?
- How do you believe your disability / health condition / caring responsibility affects your daily life and work?

B. What helps you perform at your best in the workplace?

- Is there a particular time of day when you work best?
- Are there any aspects of your role that you particularly enjoy or feel you flourish at?



C. What can we do to support you?

- Are there any adjustments you believe would enable you to carry out your role more effectively?
- Is there any technology or equipment that could potentially help you at work?

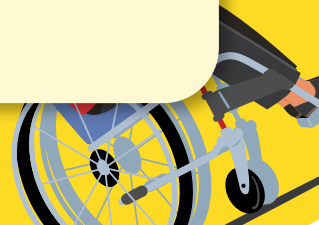
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D. Is there anything else that would be helpful for your manager to know that should be recorded in the Passport?

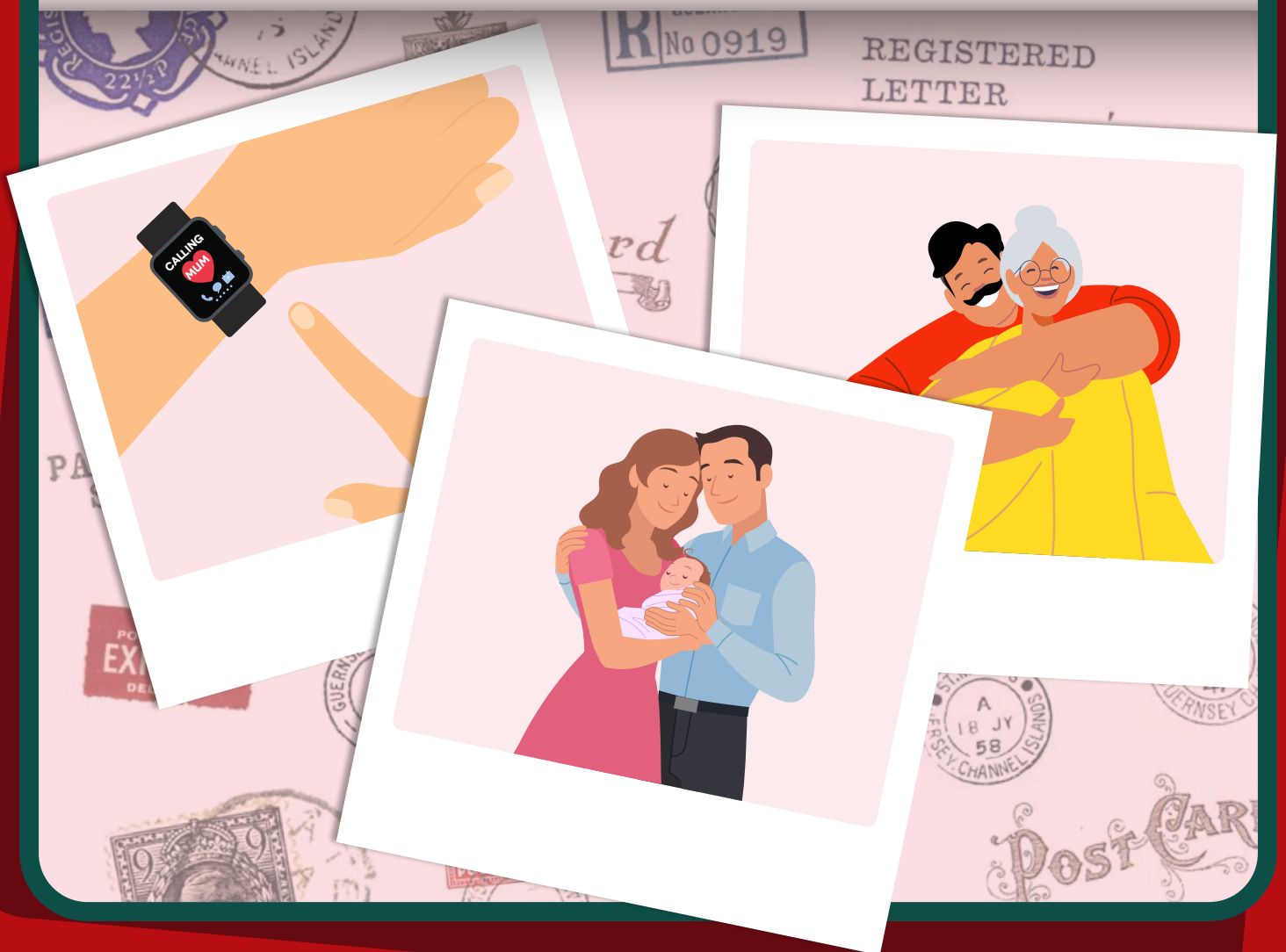
- You can also record any discussion outcomes here

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SECTION 2: EMERGENCY INFORMATION

- Do we have the right emergency contact details for you?
(Record them below just in case)
- Is there anything else we should do in an emergency?



SECTION 3: WORKPLACE ADJUSTMENTS

This section may not be needed in all cases. If workplace adjustments are not needed, your manager will indicate below that this section is not applicable.

If workplace adjustments are being considered, your manager will update this section once they have reviewed your Passport and discussed it with you. As part of their review and with your consent, they may decide to refer you to Occupational Health, who will be able to recommend adjustments that will best support you. You can also ask for a referral to be made if you believe one is appropriate. Your manager will discuss adjustments with you using the Workplace Adjustments guide and together you will complete the section below to confirm what has been agreed.

If you already have a workplace adjustment(s) in place, you should also complete this section with your manager to confirm that the adjustments are still appropriate and are reviewed regularly.



What adjustment has been agreed?	
What's the reason for the adjustment?	
Is the adjustment temporary or permanent?	
How often will the adjustment be reviewed?	



SECTION 4: PASSPORT REVIEWS

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In this section, you and your manager will record how often the Passport should be reviewed. All Passports should be reviewed at least once every 12 months; however in some cases it might be appropriate for the Passport to be reviewed more often.

My Passport will be reviewed every
(This should be every 12 months as a minimum)

Please include the date the Passport was completed plus the dates and details of any updates in the table below:

Key dates	Passport owner (signed)	Manager (signed)	Details of changes
Initial completion:			
Review 1:			
Review 2:			
Review 3:			
Review 4:			

SECTION 5: ADDITIONAL INFORMATION

Use the space below for extra room if needed



WELCOME ABOARD PASS

PASSPORT
COMPLETION
PASS



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Royal Mail Passport Support Guide

To print or download a PDF of this document, click on the three white lines on the bottom left of the screen.



ROYAL MAIL GROUP

Passport Support Guide

Royal Mail is committed to considering and implementing appropriate support to employees where their ability to work is impacted by a disability, health condition or caring responsibility.

This guide supports managers with helping an employee to complete a passport where one is appropriate. It should be read alongside the passport and provides a step by step process for managers to follow, as well as further resources and useful contacts who can offer more support.

This guide:

- applies to all employees of Royal Mail Group Limited (including Parcelforce Worldwide);
- **does not apply to agency staff, contractors or self-employed individuals;** and
- is effective from XX XX XXXX.

This guide does not form part of any employee's contract and we may amend it at any time.

In this document, 'Royal Mail Group Limited' will be referred to as 'Royal Mail Group'.

Roles & responsibilities

- The Chief People Officer (CPO) is accountable for the People Policy and its associated procedures and guidelines
- The Head of HR Policy is responsible for developing and maintaining this guide
- Managers are responsible for the application of this guide within their areas of responsibility
- Employees are responsible for communicating and liaising with their manager and providing any relevant information and documentation relating to the Passport process

Chief People Officer

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Completing the Passport



Section 1 - Details of the disability, health condition or caring responsibility



Section 2 - Emergency Information



Section 3 - Workplace adjustments



Section 4 - Passport review



Support and resources



Appendix



Overview

The Royal Mail passport is a confidential document designed to support an employee who feels their ability to work may be impacted by a disability, health condition, or caring responsibility.



Your role as a manager

Your role as a manager is to support the employee to complete their passport. You can do this by:

- > supporting an employee who has approached you directly;
- > reaching out to support an employee you have noticed has been struggling at work; or
- > arranging to meet with an employee following receipt of a notification after they updated their “This is me” profile within the People App to highlight they have a disability, health condition or are a carer.



The employee is encouraged to complete the first section of the passport in advance, and you can send a copy of the passport to the employee via email or provide a printed version outlining what they should do. If they have not completed the first section, you should complete it with them when you meet. Once the passport is completed, it will be held securely in People Case Manager (PCM).

The passport will give you an opportunity to better understand the employee’s circumstances and implement any necessary workplace adjustments where appropriate. You should ensure the employee is aware that once the passport is complete, it will be shared automatically with you as their manager, or with any new manager, including when they change roles or work locations. If the employee does not want to complete the passport and you believe workplace adjustments are required, please contact the Employee Relations team (PCAT) for further guidance.

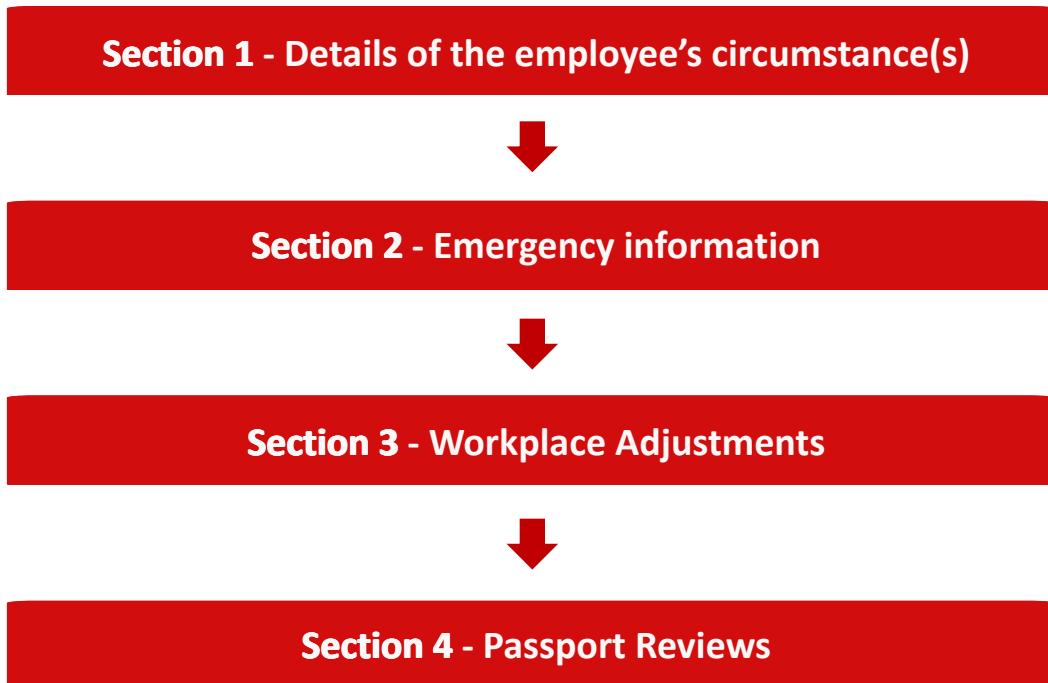
Once a passport is in place, it should be reviewed every 12 months as a minimum to make sure the information is up to date and any implemented adjustments are still fit for purpose.

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Completing the passport

This guide should be read alongside the passport and aims to provide a helpful prompt for you to support the employee to complete their passport. Once you have completed the document, make sure you save a copy. There is a form in Appendix A that you can use to prepare for the meeting and to record feedback from the meeting. You can use this as you complete the passport with the employee and to keep a record of the meeting. Please note that these notes could be disclosed if requested by the employee.

The passport should focus on what the employee **can** do so they can continue to carry out their role effectively. The document includes separate sections which cover:



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Section 1 - Details of the disability, health condition or caring responsibility

A) What do we need to know about the employee's disability, health condition or caring responsibility?



Record the details of their circumstance(s). Some questions you can ask if they have not completed this section include:

- > What is the general nature of your disability, health condition or caring responsibility? (i.e., how does it affect you and your daily life?)
- > How long have you had the disability, health condition or caring responsibility?
- > What is the impact of your disability, health condition or caring responsibility on your work?
- > Are you currently taking any medication? If so, what are the impacts of this?
- > Are you receiving any ongoing support or treatment outside of work? If so, what is the support/treatment?
- > Are your caring responsibilities shared and are you seeking any support for them outside of work? If so, what does this include?
- > What aspects of your role do you find are more difficult to undertake because of your disability, health condition or caring responsibility?
- > Are there particular situations that make your work more difficult?

Continued over the page →

B) What helps the employee to do their role?

Record what helps them to do their role. Some questions you can ask to complete this section include:

- > Does your condition vary depending on the time of day, day of the week or environment you are working in?
- > Is there anything that you do now or that you have done before that helps you in your role?
- > Are there any aspects of your role that you particularly enjoy or feel you flourish at?

C) What can we do to support the employee?

Record what help they think they need, if any. Questions you can ask to complete this section include:

- > Do you need any support to carry out your role?
- > Did you need any support or did you have any adjustments in place when you were in education or a previous role? If so, what were they?
- > Do you need any support to access work?
- > Do you need any support to communicate with other team members?
- > Are there any specific aspects of your role you find challenging to manage due to your caring responsibilities?
- > Are there any particular times of the day or week when you require more flexibility?
- > What do you think would help you?

Continued over the page →

D) Is there anything else that the employee feels would be helpful for you to know and to have recorded in the passport?

Record this detail if there is anything further to add.

- If appropriate; you should ask if there is a work colleague they trust to speak to when they are feeling unwell or need additional support.

Section 2 - Emergency information

Check you have the emergency contact details recorded (if appropriate).



You can include the details within the passport or make sure the emergency contact details are recorded in the “This is me” information.

Questions to ask could include:

- Are your emergency contact details up to date? – you can check these with the employee if they are not sure.
- Is there anything I should be aware of in an emergency? – for example if they have an epi pen.

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Section 3 - Workplace adjustments

If workplace adjustments are not needed, update this section to state workplace adjustments are not applicable and move to Section 4, Passport Reviews.

Whilst completing the passport with the employee, you may find that a workplace adjustment is required. You can use the Workplace Adjustments - A Manager's Guide to help you with exploring, implementing, and reviewing adjustments. You can only complete this part of the passport with the employee once you have considered workplace adjustments with the employee and agreed an approach.

Once you have explored and identified a suitable workplace adjustment, you should arrange an informal meeting to agree this with the employee. You should record the following details in the passport:

- > What adjustment has been agreed?
- > What is the reason for the adjustment?
- > Is the adjustment temporary or permanent?
- > How often will the adjustment be reviewed?



If the employee does not agree to any of the adjustments you have suggested, you may have to explore alternative options. This may include repeating the previous scoping steps to search for alternative arrangements or contacting the Employee Relations team (PCAT) for further support.

If the employee has an existing adjustment(s) in place, you should use this opportunity to make sure the adjustment(s) is still appropriate and the details of the adjustment(s) are recorded in this section.

Use the template in the Appendix to plan for the meeting and record notes from the meeting. The template covers what has been agreed and why, what the next steps are and what you should consider if you are unable to agree a workplace adjustment at this point.

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Section 4 - Passport review

Within this section you should record when the passport will be reviewed. The passport should be reviewed every 12 months as a minimum.



In cases where the adjustment is temporary, or you are unsure if it will be effective, you should agree to a shorter review period. This could be a few weeks or a few months, depending on the circumstances.



As part of the passport review, you should record the date the initial passport was completed and then update each time there are changes. Both you and the employee should sign the document. If the employee will not agree to sign, then contact the Employee Relations team (PCAT) for guidance and support.

Saving and sharing the passport

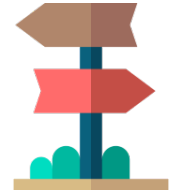
Once the passport is completed, you should create a Workplace Adjustments case in People Case Manager (PCM) and upload the document to the case. You should then share a copy with the employee. This can be done by sharing an electronic copy via e-mail, by printing and sending it to them or giving them a hard copy. Please make sure you mark the document “Confidential”.



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Support and resources

The following resources are available to support you.



Workplace Adjustments - A Manager's Guide

The Workplace Adjustments – A Manager’s Guide will support you when considering, exploring, implementing and reviewing temporary or permanent workplace adjustments and includes detailed examples of potential adjustments.

Workplace Adjustments Toolkit

The Workplace Adjustments Toolkit signposts additional resources, such as the Inclusion Hub and the Wellbeing Hub, where you can find out more about an employee’s condition and how, as a manager, you can best support them.



Employee support and resources

Make sure the employee is aware of the range of support available to them through the Help@hand service, which includes the wellbeing Employee Assistance Programme (EAP) helpline on 0345 266 5060. They can access more information about all the support available to them on our Wellbeing Hub (www.myroyalmail.com → "Your wellbeing") or via the “Your Wellbeing” tile on the People App.



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Appendix

Use this template (which you can access [here](#)) to help you prepare for the meeting with the employee, to discuss their passport and if there is the need for a workplace adjustment.



Pre-meeting

Pre-meeting notes: Prompt – *are there any actions you have taken and/or outputs of an OH referral that you need to progress (if one was made)?*

Scoping discussions: Prompt – *from your discussions, scoping, and research, what workplace adjustment(s) do you think would be most supportive and beneficial for the employee? Has the employee requested any adjustments that you could explore? If you had submitted an OH referral, what adjustments have they recommended?*

Continued over the page →

When the workplace adjustment is agreed, you can capture the details and any resulting actions in this part of the template.



Workplace adjustment agreed

Workplace adjustment agreed: *Prompt* – *if the employee has agreed to the adjustment you have suggested, then you can record any relevant details here. You should also include in the passport what adjustment has been agreed, why the adjustment has been made; whether it is temporary or permanent and how often it will be reviewed. You can also use this section to record any agreed adjustment(s) already in place.*

Next actions: *Prompt* – *what actions are needed to implement the adjustment? Is there anything further you can do immediately to help the employee if the adjustment cannot be implemented straight away?*

Continued over the page →

When you can't agree on a suitable workplace adjustment, you should capture the reasons why in this part of the template.



Workplace adjustment not agreed

Workplace adjustment not agreed: Prompt – *if the employee has not agreed to the adjustment you have suggested, have they suggested anything else you could explore? If an adjustment cannot be agreed / cannot be accommodated, you should note down the reasons here. (Remember to make sure you exhaust all options before moving to redeployment - you can contact the Employee Relations team (PCAT) if you need further support).*

If, after you have exhausted **all** options and have contacted the Employee Relations team (PCAT), you find that redeployment is the appropriate next step, you should follow the guidance outlined in the Attendance – A Manager's Guide document. You should make sure you have provided detailed reasoning for this decision.

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