# Tailored Adjustments Plans, Passports and Agreements

## What is a ‘Tailored Adjustments Plan’, ‘Passport’ or ‘Agreement’ ?

A ‘Tailored Adjustments Plan’ is a living record of adjustments agreed between an employee and their line manager. Some organisations refer to these as ‘Passports’ or ‘Agreements’.

The purpose of this living record is to:

* Ensure that the employee and line manager have a record of what has been agreed;
* Provide employees and their line managers with a structure to use when regularly reviewing and updating information about workplace adjustments.
* Act as a starting point for discussion when an employee changes jobs, is relocated, or assigned a new manager within the organisation.
* Plan for when an employee is unwell and needs additional support because of their disability or condition. This particularly applies to employees with fluctuating or progressive conditions.

## Passports, Plans or Agreements - Does the title matter?

In this resource we will be referring to the living record as a ‘Tailored Adjustments Plan’ as we believe that this title most accurately reflects the intended purpose of the record. While terms such as ‘Passport’ and ‘Agreement’ are widely used, evidence from BDF Members suggests that many employers find such terms unhelpful and confusing when discussing adjustments.

The term ‘Passport’ suggests that all adjustments are portable and are automatically transferred across to an employee’s new role without the need for discussion. In reality, not every team in an organisation works in the same way and an employee may require different adjustments to carry out a new role. It may also be beneficial for a new manager to discuss the adjustment plan with the employee, to help them gain a better understanding of how they can best support the individual.

The language of ‘Agreement’ comes from a time when disability inclusion was regarded solely as a ‘legal duty’. As organisations have moved towards wanting to engage and recruit more diversely, terms such as ‘agreement’ feel at odds with the practice of adopting collaborative and supportive discussions.

Using a title that accurately reflects the purpose of your plan will help to ensure plans are used effectively and deliver the adjustments needed.

## A living record

The key purpose of a ‘Tailored Adjustments Plan’ is to be a living record. This means that the plan should be reviewed and updated regularly as appropriate and with the agreement of the employee and the line manager:

* At any regular one-to-one meeting;
* At a return-to-work meeting following a period of sickness absence;
* At an appraisal or performance review meeting;
* Before a change of job or duties or introduction of new technology or ways of working;
* Before or after any change in circumstances for either the organisation or the employee e.g. a change to working location or after a period of time in a new role or working with a new manager.

## Tailored Adjustments Plans and the Workplace Adjustments Process

A Tailored Adjustments Plan is just one feature of an effective workplace adjustments process. It can be a very useful tool when used correctly but on its own does not fulfil the duty on employers to make adjustments.

To be most effective, a Tailored Adjustments Plan should be:

* Introduced into the discussion about adjustments early on.
* Supported by a robust and responsive workplace adjustments process.
* Owned by the employee and shared only with their consent.
* Supported by the line manager.
* Viewed as a living document, which is regularly reviewed and updated.

Seen as a tool to support positive discussion around adjustments.

## A Tailored Adjustments Plan: Notes for managers

A Tailored Adjustments Plan allows managers to:

* Understand how a particular employee’s disability or condition affects them at work;
* Explain the needs of the business or organisation;
* Explain the organisation’s attendance and workplace adjustments policy;
* Recognise signs that an employee might be unwell and know what the employee wants you to do in these circumstances – including who to contact for help;
* Know how and when to stay in touch if the employee is off sick;
* Consider whether the employee needs to be referred for an assessment by an occupational health or another adviser to help both parties understand what adjustments could be effective;
* Review the effectiveness of the adjustments already agreed;

Explain any change in the employer’s circumstances.

The plan should be regularly reviewed and updated. Remember, however, that expert advice from third parties (such as occupational health advisers, Access to Work, or IT specialists) may be needed before changes can be agreed and implemented.

Managers who need help in deciding whether an adjustment is ‘reasonable’ will find it helpful to use the **‘Reasonable adjustment decision and form**’ available from the Advice Service at Business Disability Forum:

Email: [advice@businessdisabilityforum.org.uk](mailto:advice@businessdisabilityforum.org.uk)

Phone: 020 7403 3020

## A Tailored Adjustment Plan: Notes for employees

A ‘Tailored Adjustments Plan’ allows employees to:

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

# Tailored Adjustments Plan

## Employee: How my disability or condition impacts me at work

|  |  |  |
| --- | --- | --- |
| **The disability or condition has the following impact at work:** | | |
|  | | |
| **I need the following agreed reasonable adjustments (refer to Access to Work agreement if relevant):** | **Date budget holder contacted if relevant:** | **Date implemented:** |
|  |  |  |

**If a condition fluctuates**

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| --- |
| **When the employee is feeling well (i.e. on a ‘good’ day), their disability or condition has the following impact on them at work:** |
|  |
| **When the employee is feeling unwell (i.e. a ‘not so good’ or ‘bad’ day), the employee experiences the following symptoms which may indicate they are not well enough to be at work:** |
|  |

### Contact details in case of an emergency

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

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

The employee should inform the line manager if there are changes to their condition which have an effect on their work and/or if the agreed adjustments are not working. They should then meet privately to discuss any further reasonable adjustments or changes that should be made.

If the line manager notices a change in the employee’s performance at work or feels these adjustments are not working, the employee and the line manager should meet to discuss alternatives.

# Line manager: How to support [Name of employee]

## 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?** | (for example, email, telephone, text, letter) |
| **How often?** | (for example, daily, weekly, monthly) |
| **When?** | (for example, preferred day and time) |

**Conversations while the employee is on sick leave**

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| **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.** |

## Return to work

When the employee is ready to return to work after a period of sickness or disability related absence of more than [x] days, the employee and line manager will meet to review this Tailored Adjustment Plan and make any necessary amendments.

|  |
| --- |
| **At this return to work meeting, the following will be discussed:** |
| For example:   * Current work issues; * A phased return/back to work plan; * What to tell the team; * Assessments to review existing reasonable adjustments (this may include Access to Work, GP, or occupational health, for example) and identify new adjustments that might be needed. * Updating the plan to reflect the discussion (if necessary) |

**Unauthorised absences from work**

|  |
| --- |
| **If the employee is absent from work and has not followed usual procedures for notifying us that they are sick or absent for a reason relating to their disability or condition, the line manager and employee have agreed the line manager will do the following:** |
| For example;   * Try to contact the employee on their mobile; and/or * Notify the emergency contact (details above). |

**Sharing this Tailored Adjustments Plan**

An up-to-date copy of this form will be retained by employee/line manager/HR.

A copy of this form may also be given to a new or prospective line manager with the prior consent of the employee.

Business Disability Forum is committed to ensuring that all its products and services are as accessible as possible to everyone. If you wish to discuss anything with regard to the accessibility of this document please contact us.

Business Disability Forum

Nutmeg House

60 Gainsford Street

London SE1 2NY

Tel: +44-(0)20-7403-3020

Fax: +44-(0)20-7403-0404

Email: [enquiries@businessdisabilityforum.org.uk](mailto:enquiries@businessdisabilityforum.org.uk)

Web: [www.businessdisabilityforum.org.uk](http://www.businessdisabilityforum.org.uk/)

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