

**HR Guidance**

**Employee Passport Guidance**

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| Version Control | Changes Made | Author |
| Version 1  July 2018 | Introduction of new guidance for an employee passport | People Management |

1. Introduction

The purpose of the Employee Passport (or ‘Passport’) is to provide a documented record of an individual’s support requirements, which moves with them throughout their career, to allow them to function to their maximum capacity in an understanding environment, without prejudice or discrimination. This document is to be used in conjunction with any risk assessment in place.

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

* Provide employees and their line managers/head teachers with the basis for discussions about adjustments that may be needed
* Ensure that both parties have an accurate record of what has been agreed.
* Suggest adjustments that make it easier for an employee to do their job and review the effectiveness of adjustment/s provided.
* Know how and when a manager/head teacher will keep in touch for absences
* Understand how employees’ circumstances might impact them at work.
* Recognise signs i.e. when the employee might be unwell and know what they would want the line manager/head teacher or colleagues to do

1. [Scope](http://www.intouch.ccc/elibrary/Content/Intranet/536/671/5053/6001/41410105256.doc)

This scheme applies to all permanent and fixed term county council/school employees covered by the Burgundy book and Grey book, casual workers and volunteers, including people engaged to work for the council/school through agencies and is not dependent on the number of hours worked.

It is expected that governing bodies of all community and voluntary controlled schools would adopt this procedure. Foundation and voluntary aided schools and academies are encouraged to do the same.

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 (including reasonable adjustments); parents with young children; staff who observe religious festivals or celebrations such as Ramadan or daily prayers; or employees who are in the process of gender reassignment.

# Principles

* The Passport can be requested by the employee or offered by the employer and is voluntary
* Is ‘owned’ by the employee and a copy of the Passport should be held by both the employee and their manager/head teacher.
* It can be completed at any point during employment.
* The Passport will need to be reviewed on an annual basis; this may be alongside the annual appraisal process. The employee should be responsible for initiating a review if there are any changes
* Completion of the Passport includes a confidentiality agreement and details for review, this is compulsory. Section 1 requires completion for workplace adaptions (e.g. caring responsibilities or religious requirements), Section 2 requires completion for health and wellbeing requirements and Section 3 for reasonable adjustments (as defined under the Equality Act 2010) and should be completed accordingly.
* A copy of this form may also be given to a new or prospective manager/head teacher with the prior consent of the employee. If the employee changes job, is relocated or is assigned a new manager/head teacher; the new manager/head teacher should accept the adjustments outlined in this agreement as reasonable and ensure that they continue to be implemented. The agreement may need to be reviewed and amended at a later date but this should not happen until both parties have worked together for a reasonable period of time

Consideration of a disability or long-term condition has on an individual at work can include:

* Effect on co-ordination, dexterity, or mobility.
* Effect on mental health
* Effect on hearing, speech or visual impairment
* Ability to interact with colleagues
* The effect of particular working environments
* Attending medical or counselling appointments
* Learning difficulty or speech impairment
* Other physical or medical conditions

Consideration on the impact of personal circumstances has on an individual at work could include:

* Receiving phone calls from the person you care for or their carers or being called away because of an emergency
* The mental distress of knowing that the person an employee cares for is currently unwell
* Being late for work or poor timekeeping because of caring or parenting responsibilities.
* Needing to accompany the person an employee cares for to medical appointments.
* Attending medical or counselling appointments
* Needing a quiet space / time away from work during the day to observe daily prayers
* Fasting during religious observances and the effect of fasting on energy and concentration.

When deciding on what adjustments may be required, consideration should be made to the following:

* Flexible Working
* Additional training
* Specialist equipment (e.g. IT or furniture)
* Seating, parking or desk arrangements
* Allowing a guide or hearing dog into the workplace
* Change in the nature and/or amount of responsibilities
* Assisted evacuation arrangements in the event of an emergency (Personal Emergency Evacuation Plan PEEP)

Each potential adjustment should be reviewed with regard to business need / requirements and budgetary implications and should be considered in accordance with the Council/school’s policies and procedures, which are available on InTouch/school portal. Advice should be sought from People Management, Finance and/or a Senior Manager/School HR provider where necessary.

**Storing the document**

The passport **must** be completed and uploaded onto a ticket on the Service Centre Portal using [Request a Change Service > Recruitment, HR and Payroll > Document Submission (For Filing Only)](http://servicecentre.cumbria.gov.uk/helpdesk/WebObjects/Helpdesk.woa/wa/TicketActions/new?rt=251) where a hard copy will be filed in the employees personal file and can accessed at any time in iTrent People Manager by accessing the employees record and the document attachments tab.  Line Managers may also keep a hard copy provided that this is in a secure and strictly confidential location.

Schools will determine where and how the document will be stored but this should be in a secure place that is not accessible to anyone other than those the employee has given consent to have access to the document

**For Schools**

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| Name of School: |  |
| Date by which School have adopted procedure: |  |
| Signature of Chair of Governors |  |