Workplace Adjustments Planner

If you have difficulty accessing or completing this planner, need it in a different format, or would like support to complete it, please contact the Staff Disability and Mental Health Adviser.

Your name	
Line manager	
Department / institute / division / centre	

Section 1: Guidance on using this planner

This Workplace Adjustments Planner is a confidential, live record to help you and your manager discuss, agree, and review workplace adjustments. It focuses on the impact of a health condition, impairment or disability at work and the practical support needed, rather than requiring detailed medical information.

The Workplace Adjustments Planner can be used to:

- record adjustments already discussed and in place
- support discussion about what adjustments may be possible
- review and update agreed adjustments.

Before you start, you may find it helpful to read the Workplace Barriers Guide, which explains the barrier categories used in this planner and gives examples of possible adjustments.

If you only need to document adjustments that have already been agreed, you may prefer to complete the Workplace Adjustments Record instead.

You keep control of this document. Information should only be shared where necessary to understand, implement or maintain your workplace adjustments, and your manager should discuss with you what information needs to be shared, why and with whom. You do not need to complete every section in one sitting. You may leave sections blank if they are not relevant or if you would prefer to discuss them with your manager or HR before completing them.

The HR Partnering Team and Staff Disability and Mental Health Adviser are available to provide advice and support in the workplace adjustments process.

Optional notification or sharing after completion

If you feel comfortable doing so, please email the Staff Disability and Mental Health Adviser to let them know that you have completed this planner. You are also welcome to share a copy of the planner if you wish, but this is entirely optional.

Section 2: Your workplace adjustments

This section will help you and your manager identify the barriers you experience at work, explore what might help and record any adjustments that are agreed.

1. How does your health condition, impairment or disability affect you at work?

You can briefly describe anything that would be helpful for your manager to understand. You do not need to provide a diagnosis or detailed medical information.

2. What workplace barriers do you experience?

Use the table below to indicate whether each barrier category affects you at work. You can type Yes, No or Not sure, and add brief details if you wish. For detailed information about these categories, see the Workplace Barriers Guide.

Barrier category	Yes / No / Not sure	How does this affect you at work? (optional)
Communication		
Equipment		
Physical environment		
Technology		
Working arrangements		

Barrier category	Yes / No / Not sure	How does this affect you at work? (optional)
Workplace policies and procedures		
Training requirements		

Further details about barriers or anything else you would like your manager to consider (optional):

3. What workplace adjustments assist you, or would assist you, in carrying out your duties effectively and efficiently?

This section is exploratory. You can include adjustments already in place, adjustments agreed but not yet implemented, and adjustments you would like to discuss. You do not need to know what adjustment you need. The Workplace Barriers Guide includes examples of possible adjustments, and further support and advice is listed on the Workplace Adjustments Planner webpage.

4. Is there any relevant advice or recommendations you would like to include?

This might include advice from Occupational Health, Access to Work, a workplace needs assessment or a health professional.

5. If your condition, disability or health needs vary over time, what would be helpful for your manager to understand?

It may be helpful to note how your needs may change and whether different adjustments or support might be helpful at different times.

Agreed adjustments

Use the table below to record the agreed adjustment(s). Both the employee and line manager should sign below to confirm the adjustments are agreed.

Workplace barrier	Agreed adjustment(s)	Temporary / permanent / trial	Actions to implement	Action deadline

Implementation - further notes (optional)

Sign here to confirm agreed adjustments

Employee confirmation (Type name)	
Manager confirmation (Type name)	
Date adjustments agreed	

Section 3: Sharing information and keeping your plan up to date

Information from this planner should only be shared where necessary to implement or maintain workplace adjustments. Your manager should discuss with you what information needs to be shared, why and with whom.

If you change roles and have a new manager, you can share your Workplace Adjustments Planner with them so that any adjustments can be considered in the context of your new role. In most cases it is expected that adjustments will remain in place; however, a change of role may lead to differences in duties, service model, or work location which could require a review.

1. Information sharing consent

Confirm which colleagues (if any) you are comfortable for your manager to share information with, and what information may be shared.

2. Keeping in touch about changes

Agree how you and your manager will communicate about changes in your needs, circumstances, or adjustments. This might include how you will let your manager know if your needs change, and how your manager will raise any concerns about whether your adjustments are working effectively.

Emergency evacuation

Do you have a Personal Emergency Evacuation Plan (PEEP)? Yes ◯ No ◯

If you have a PEEP, please attach it to this planner. If you think you may need one, refer to the Policy for Safe Evacuation of Persons with Disabilities and discuss this with your line manager.

Section 4: Data protection

This planner contains confidential personal information and must be handled securely in line with the School's Data Protection Policy and the Data Protection Act.

- Information should only be shared where necessary to implement or maintain workplace adjustments. Managers should discuss with the employee what information needs to be shared, why and with whom.
- Where an adjustment may reveal information about an employee's disability or health, managers should agree with the employee how this will be communicated to colleagues.
- The employee and manager should retain the current planner securely in an appropriate School storage location, such as OneDrive.
- If the employee changes manager, they should agree with their current and new managers what relevant information will be transferred to ensure their adjustments continue.
- For further information about the storage, retention, and deletion of personal information, please refer to the School's Data Protection Policy.

Section 5: Adjustments review record

Workplace adjustments should be reviewed and amended where necessary to ensure they remain appropriate and effective. Reviews should take place:

- at a scheduled review date agreed between the employee and manager, such as after an initial trial period or following implementation of new adjustments
- when there is a change of job or duties
- when new technology or new ways of working are introduced
- when there is a change in circumstances or needs that may affect existing adjustments
- at the employee's request.

If you move to a new role, team or area, confirm review arrangements with your new manager. Use the table below to record each review.

Review date	What has worked / not worked	Adjustments still to be implemented	Changes or alternatives agreed	Next review date