

In Strictest Confidence when completed

BT Passport

For health, disability and
caring responsibilities

Author:

Issue:

Date:

BT Group

Please note that once this document has been completed (which means it has been signed off and dated by the employee and their manager), nothing is to be changed unless prior agreement is reached with the employee and their manager. Written permission must be sought from the employee before this document is loaded on any system.

Name of employee:

Name of manager:

Passport history

(The table below gives details of the history of the passport – the dates that previous meetings were held and who the manager at that time was)

Date of review	Manager name and details
Content	Content
Content	Content
Content	Content
Content	Content
Content	Content
Content	Content

Passport closure: Please enter details when the passport is no longer required:

What is a BT Passport?

A BT Passport is a simple word document which can be completed by any employee who feels their circumstances could have an impact on their ability to work either currently or at some point in the future due to health, disability or caring responsibilities. We have developed it to help individuals and their manager record any information and agreed actions relating to the individual’s circumstances. BT and our Trade Unions worked together to create the BT Passport.

Completing a Passport is voluntary on the part of the individual, and although colleagues are able to voluntarily indicate whether or not they have a passport in the HR systems, there is no requirement to record of who has or hasn't completed one. The passport can be downloaded and completed at a one-to-one with their manager. Its completion is aimed to provoke discussion about balancing business and individual needs and to record the outcome of that discussion. **After completion, it is recommended the passport is reviewed at least quarterly, or more frequently if required, at the discretion of the individual and manager so that changes can be discussed and recorded.**

Once completed the passport is confidential between the two signatories, but if the individual's line management changes, it is recommended the passport should be handed over to the new manager with the new signatories maintaining confidentiality. This removes the need to repeat personal information and re-visit local agreements already reached between the original manager and the individual.

This document is designed to be completed on-line and saved by the manager and individual with due regard to the confidentiality of the individual when completed. **It's a local arrangement and does not change an individual's terms and conditions of employment.**

The Passport

The BT Passport can be completed by any employee whose health, disability or caring responsibilities they believe could have an impact on their ability to work currently or at some point in the future. A carer is defined as "an employee responsible for the care and support of a disabled, elderly or sick partner, relative or friend who is struggling to care for themselves".

The focus of the BT Passport is firmly on what the employee can do rather than what they can't and in helping to removing any barriers that might prevent them from making a full contribution at work. It is there to help the employee and their manager and not to have a detrimental effect in any way.

The BT Passport describes, amongst other things:

- the nature of the disability, health condition or external responsibilities, e.g. caring
- the potential impact of an individual's condition/circumstances on their ability to do their job effectively
- any medication required, and any implications
- any workplace adjustments the individual might need which will allow them to carry on doing their job
- a list of resources that can be called upon to support them and their manager in helping them to continue working
- action to take if the individual becomes unwell at work or needs to leave work suddenly
- agreed communication between the individual and BT if the individual is unable to come to work.

Before completing a Passport please ensure you are fully briefed on the toolkit of resource available to support our people. Please see Appendix B at the bottom of the document for a list of helpful resources.

A Passport isn't legally binding and is not intended to impact your employment rights. It should be regularly reviewed with your manager.

Passport details

Document completion information

(The table below gives details of the last meeting held at which this passport was discussed and agreed with the employee and their manager).

In completing this document the employee consents to the information contained in this passport being accessed or stored by their manager electronically on their BT laptop. **Written permission must be sought from the employee before this document is loaded on any system.**



If the employee has a change of manager, the losing manager will seek the employees consent prior to the passport being transferred either via secure mail or encrypted and marked “IN STRICTEST CONFIDENCE” to a new manager in the future.

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Item	Details
Date of meeting to complete this document	
Location of meeting	
Employee name and details	
Manager name and details	
Other attendees and their role	
Purpose of meeting	
Current role of individual	

Overview of employee’s health, disability or circumstances & history

(This will allow the employee and manager to gain a better understanding of the individual’s condition/illness or caring responsibilities, and how it affects the individual).

Enter details here:

Suggested questions

(The table below contains a number of questions that can be used to start the discussion. Please add any new questions as required. If further work/investigation is required then action points can be documented.)

Question	Answer	Action points, date and owner(s)
What is the general nature of your health, disability, caring responsibilities, or personal circumstances?		
What is the pattern? Are things stable, relapsing/remitting, recurrent, deteriorating, etc?		
What is the impact on you, i.e. how does it affect you physically, emotionally & behaviourally?		
If relevant: What medication are you receiving and what are the possible effects of this medication? How do they impact your work?		
How does your situation normally affect your day-to-day activities?		
How does your situation normally impact on your ability to do your job?		
What ongoing treatment or support are you receiving outside of work?		
If relevant: Have you had any Occupational Health (OHS), Workplace adjustment or Access To Work assessments? When were they and are they still relevant?		
What management strategies/workplace adjustments are in place to support you? (e.g. time out, reduced hours, soft adjustments such as targets)	Please enter details in Appendix A.	
What additional adjustments would allow you to work effectively despite your condition?	Please enter details in Appendix A.	

Are these adjustments required on a temporary basis (up to 6 months) or more permanently?

Do you need to agree these adjustments with anyone else in the business, e.g. attendance management unit?

Are there early warning signs that things are becoming worse? If so, please describe.

Is there a work colleague you trust to advise you if they think you are becoming unwell? If so, please give their name and contact details.

Who else in the workplace needs to know about your condition/situation?

Who are the people you want to be contacted in the event that you become unwell at work?

Please enter details in the emergency information section below:

How would you prefer to communicate with your manager if you are unable to come to work?

Please enter details in the emergency information section below:

Emergency information

Make sure both manager and individual have reviewed the emergency contact details on the HR system and confirmed they are correct.

Please provide any additional information that may be useful in case of an emergency related to your situation if appropriate.

Question

Answer

How would you prefer to communicate with your manager if you are unable to come to work?

Emergency contact information – the person(s) the manager can contact should you become ill at work or if your condition at work causes concern?

In addition to the primary contact(s) on the HR system:

Please include their name, relationship and contact details.

Is there anything else we should do
in an emergency?

External sources of support that you are happy for your line manager to contact on your behalf if you become unwell:
e.g. GP (doctor), Case Worker, CPN (community psychiatric nurse), etc.

Contact name	Phone number	Organisation	Role



Appendix A Agreed adjustments

(Provide a list of all your currently agreed adjustments.)

[illegible]

Appendix B Useful resources

[Removed for purposes of sharing to IoIC]

Version no	Date	Change made by	Brief details of change





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