

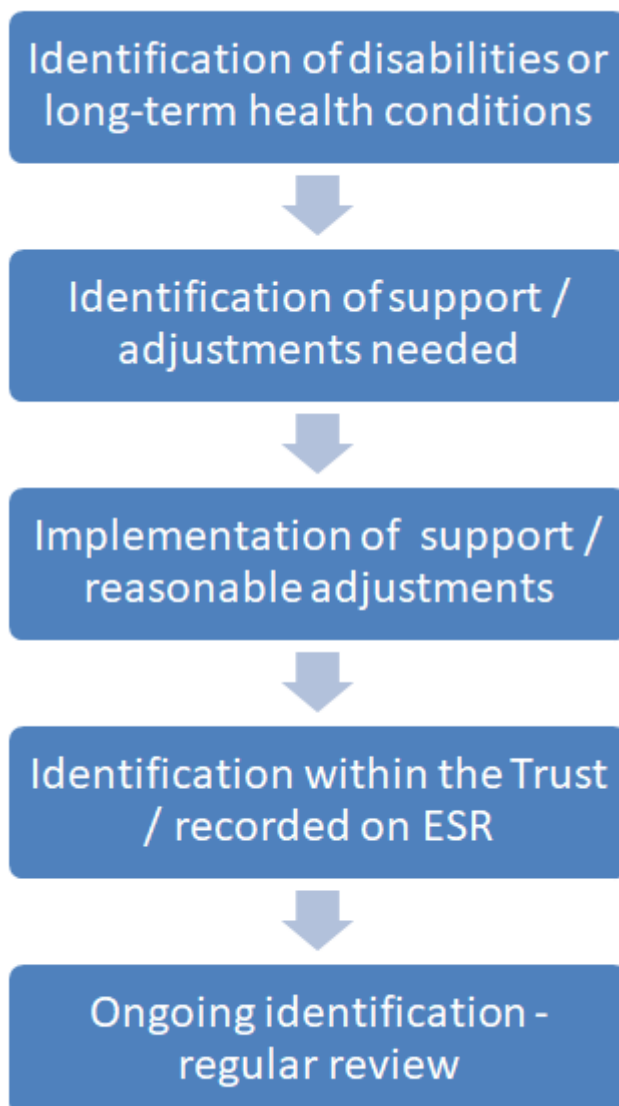
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Disability and Long-Term Conditions Policy (incorporating Disability Leave)

Version: 6

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Key Stages



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1 Introduction

Wirral University Teaching Hospital NHS Foundation Trust (WUTH) is committed to being an organisation within which diversity is valued and appreciated. WUTH recognises that everyone is different, valuing the unique contribution that individual experience, knowledge and skills can make in delivering service goals and that is visible and apparent at all levels of the organisation.

WUTH is therefore committed to proactively supporting people with disabilities and has pledged its commitment as part of the Government's Disability Confident Scheme.

In accordance with the Equality Act 2010 and public sector equality duties, WUTH will not discriminate against employees with disabilities but will consider and support their needs as far as is reasonably practicable.

WUTH will actively work to promote positive attitudes and eliminate discrimination and harassment of people with disabilities. It will also actively encourage people with disabilities to have a voice, share thoughts, ideas and concerns and be involved in shaping future support within the Trust.

WUTH will make every effort to retain, retrain and rehabilitate staff who have or acquire a disability or long-term health condition during their working life.

WUTH will not tolerate discrimination, victimisation, bullying or harassment of any kind by any party. Any action found to be in breach of any of these would be addressed in accordance with the Trust's Policies and Procedures.

2 Purpose

The Trust acknowledges the positive contribution people with disabilities or long-term health conditions can bring to the workplace and this policy therefore seeks to provide both employees with disabilities and long-term health conditions and their line managers with information to identify reasonable adjustments and support in the workplace.

This policy was previously known as the Disability Leave policy however the scope has now been widened.

3 Scope

The principles of the policy seek to support all employees and staff working on Trust premises with disabilities as defined under the Equality Act 2010, also detailed in section 4.

Where reference is made to an individual's terms and conditions of service e.g. disability leave, this policy would then specifically cover paid employees only.

Students who are not employees of the Trust, would need to access support from their teaching organisation and volunteers should access their handbook or Volunteer Co-Ordinator for more information.

4 Definitions

Access to Work- Access to Work (AtW) is a publicly funded employment support programme that aims to help more disabled people start or stay in work. It can provide practical and financial support for people who have a disability or long term physical or mental health condition. Support can be provided where someone needs help or adaptations beyond reasonable adjustments.(NB: This may also require part funding by the Trust)

Disability - The Equality Act 2010 defines disability as “a mental or physical impairment that has a substantial and long-term effect on a person's ability to carry out normal day-to-day activities”. ‘Long-term’ typically means 12-months or more but HIV infection, cancer and multiple sclerosis are included from the point of their diagnosis.

People who have a disability but no longer have significant symptoms still qualify as disabled under the act. For example, someone with a chronic illness (such as multiple sclerosis, rheumatoid arthritis, diabetes or fibromyalgia syndrome) who may experience remissions and relapses. This also applies to people who have mental health illness who may be controlling their symptoms but whose needs are on-going.

The Equality Act 2010 provides disabled people with protection from discrimination in a range of areas, including employment.

Disability Confident - The Disability Confident government scheme is a recognition given by self and peer assessments to take action to meet five commitments regarding the employment, retention, training and career development of disabled employees. It is represented by the Disability Confident symbol that participating organisations are authorised to display.

Disability Leave – absence from work pre-agreed as a reasonable adjustment, using the agreement process within this policy, where an individual needs to be away from work due to their disability.

Discrimination

Direct discrimination – when someone is treated less favourably than someone else because of a disability e.g. an employer does not employ a disabled person just because it does not want disabled people in its workforce.

This can be broken down into three different sorts of treating someone less favourably because of:

- 1) Their own disability (ordinary direct discrimination)
- 2) A perceived disability (direct discrimination by perception)

- 3) Their association with someone who is disabled (direct discrimination by association)

Indirect discrimination – can occur where a rule, practice or procedure is applied to all employees, but disadvantages those who are disabled.

Reasonable adjustment- The duty to make sure that a disabled person has, as far as is reasonable, the same access to everything that is involved in getting and doing a job as a non-disabled person. An adjustment is reasonable to the extent to which it is or might be effective, practicable and acceptable to the requirements of the organisation, affordable or within the means available to the organisation.

Rehabilitation is a treatment or treatments designed to facilitate the process of recovery from injury, illness, or disease to as normal a condition as possible.

For a period to be classed as rehabilitation the staff member must be actively receiving rehabilitation treatment / training e.g. physio, speech therapy, guide dog training etc.

Recuperation is the process of recovering health and strength.

It is important to note the difference between Rehabilitation (days when staff are actively being rehabilitated do attract disability leave) & Recuperation (days when staff are recovering do not attract disability leave). For example, in the case of a disability related operation any time off for pre-operative assessment would be disability leave (as its Assessment), the day of the operation is disability leave (as its Treatment) and any days where the staff member received planned active treatment to promote recovery, e.g. physiotherapy, would be disability leave (as its Rehabilitation). What is not covered is recuperation i.e. time spent healing / recovering from the operation.

(Please note that whilst disability leave might not be applicable in circumstances such as above managers do need to consider reasonable adjustments, for further details see the Attendance Capability policy or contact your HR manager for advice).

5 Duties / Responsibilities

It is the responsibility of all Trust employees to implement this policy. It is the responsibility of departmental and line managers with a supervisory role to follow the procedures.

All Employees	<ul style="list-style-type: none">• Employees should inform their manager or Occupational Health of any concerns which may affect their ability to attend work and to enter in to a discussion regarding potential reasonable adjustments within the workplace.• Staff must comply with Trust-wide policies and procedures appropriate to their area of practice. If any aspect of a policy causes concern or requires altering, staff should inform their line manager in the first instance who can then notify the policy author.• Employees are encouraged to update their electronic staff records to highlight that they have a disability as defined in section 4.
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Managers	<p>The role of the line manager is critical in ensuring support for staff who have a disability or long-term health condition and acting quickly to remove or minimise barriers as they arise. The line manager is responsible for:</p> <ul style="list-style-type: none"> • Treating all staff fairly, giving due consideration to potential adjustments in the workplace and additional support as deemed reasonable practicable. • Complying with the Equality Act (2010) in relation to disability and the Trust's wider policies on equal opportunities and dignity at work, seeking the appropriate advice and support from HR and Occupational Health, as required • Ensuring the reasonable adjustments planning documentation is reviewed and completed with staff • Review relevant risk assessments pertaining to the individual's role and ensure any necessary action is taken to reduce or eliminate risks as necessary • Ensuring regular reviews are in place with staff to ensure any adjustments made continue to be effective • Encouraging and supporting staff to update their electronic staff records to highlight they have a disability as defined in section 4 • Ensuring they keep up to date with Trust advice and best practice guidance in relation to supporting staff with a disability or long-term health condition, seeking advice and support as necessary • Ensuring that their staff have read and understood relevant Trust-wide policies and procedures and act in accordance with the policies appropriate to their role.
Human Resources	<ul style="list-style-type: none"> • To provide advice and support to those who require it, on the application of this policy.
Occupational Health	<ul style="list-style-type: none"> • To offer confidential advice and support to the employee, manager and HR to help facilitate the best way forward. Advice will be based on knowledge of the illness and the employee's job and can be at any stage e.g. whilst the employee is in work, during sickness absence and on return to work. <p>In certain circumstances and with the employee's consent, Occupational Health will seek the opinion of the employee's General Practitioner and/or Specialist.</p> <p>In the event of a referral from the Manager, Occupational Health will respond in writing and also send a copy of the correspondence to the employee</p>
Workforce Steering Group	<p>Workforce Steering Group is responsible for the approval and performance management of this policy and procedure.</p>

6 General Principles

Research shows that the people with disabilities face discrimination and disadvantage in the workplace and society. WUTH is committed to proactively supporting people with disabilities and long-term health conditions and has pledged its commitment as part of the Government's Disability Confident Scheme, to play a leading role in changing attitudes and support available for the better.

This policy seeks to outline the key stages required in supporting staff with a disability or long-term health condition whilst also ensuring the Trust meets the requirements placed upon it under the Equality Act 2010 and public sector equality duties.

7 Process

7.1 Recruitment

All recruitment information should include the Disability Confident logo to ensure all prospective employees are aware of the Trust's commitment to people with disabilities and support offered as part of the recruitment process.

As a Disability Confident Employer, prospective staff will be provided with the opportunity to indicate that they have a disability. The applicant will be afforded the appropriate steps to ensure the application, shortlisting and recruitment process provides any reasonable adjustments required to maintain equality of opportunity for prospective employees.

The Trust agrees to interview all disabled applicants who meet the minimum criteria for a job vacancy and to consider them on their abilities.

It is essential that the job description clearly describes what is required for the post to ensure the applicant, manager and occupational health team can ascertain any reasonable adjustments that may be required by the post holder.

Once appointed, employees are required to complete a pre-employment health questionnaire, to be reviewed by Occupational Health and should be sent the Reasonable Adjustment planning form (Appendix C) to aid identification of any reasonable adjustments that may be required in advance of commencement into post. Considerations must also include any support required to complete the Trust's welcome event and induction. Where adjustments are required, the recruiting manager should meet with the new recruit in advance of their commencement in post, to review the reasonable adjustment planning form (appendix C) and agree the way forward. The manager must also complete the personal emergency egress planning (PEEP) form (appendix D) as necessary.

Where local reasonable adjustments are insufficient or inadequate, referrals should be made to Access to Work as soon as possible, in order for a workplace assessment to be completed. If organised within 6 weeks of commencement, additional funding may be obtained towards provision of adjustments necessary.

A confirmation letter (appendix E) should then be sent to the new recruit and Trust central contact point (as indicated on the letter) to confirm the outcome of the discussion.

Recruiting managers should encourage new recruits to update their disability status within their electronic staff record (ESR) to aid wider Trust monitoring and support.

Recruiting managers should ensure an appropriate review date is agreed e.g. after 3 months or sooner if the need arises.

7.2 Existing Staff

Staff already in employment may disclose that they have developed a disability or that they have had a disability for some time. Some employees may not have disclosed their disability before as it may not have interfered with their ability to do their job but may now find it is impacting on their performance. A manager may discover when conducting a performance management review or dealing with an unacceptable attendance record that the employee has a disability, knowingly or not.

Staff should be encouraged to disclose whether they have a disability or long-term health condition in order that the Trust can not only ensure that support is made available as necessary, but also to ensure effective monitoring of the levels and needs of staff within the Trust.

On identification of a disability or long-term health condition, the staff member and their manager should meet to complete the reasonable adjustment planning form (appendix C) and personal emergency egress planning (PEEP) form (Appendix D) where necessary. This is to identify any reasonable adjustments that may need to be put in place and ensure adequate support is in place. An occupational health referral is also advised at this point.

If the employee does not feel they require any reasonable adjustments to be in place, this should be recorded, along with confirmation of any other support required and review arrangements. A review should take place with the staff member, at least on an annual basis or earlier if the need arises.

Should the employee and the manager have concerns about the employee's ability to do the job or to make reasonable adjustments that may be required, this should be recorded and with the employee's permission, assessments and additional support sought from those listed within section 10.

A referral to Access to Work needs to be made by the employee as required.

The manager should collate the outcomes of any assessments including where appropriate a copy of the Access to Work report, which will be provided by the employee. A discussion will follow between the manager and the employee to ascertain what reasonable adjustments could be made to support the employee to do their job and which do not compromise health and safety of the employee or others.

Outcomes of any discussion, including reasonable adjustments agreed, should be confirmed by letter to the individual using the template letter (appendix E). The letter should include a review date, which must take place at least on an annual basis or earlier if the need arises.

In the event of not agreeing reasonable adjustments the manager must inform the employee in writing of the decision and the reasons for making it. If the disabled employee feels they are being treated unfairly they can seek further advice and support from those detailed in section 10 and if still unhappy, should refer to the Trust's grievance procedure.

Where an individual with a reasonable adjustments agreement transfers to a new department, it is the responsibility of the current line manager to ensure that this information transfers to the new recruiting manager, with agreement from the individual concerned.

8 Making Reasonable Adjustments

The Trust has a duty to make reasonable adjustments under the Equality Act 2010 in accordance with good employment practice as recommended by the Equality and Human Rights Commission.

Adjustments can include minor adjustments to the workplace including Health and Safety, ergonomic assessments and provision of equipment.

Access to Work programme gives employers financial help with expensive equipment, major adaptations and support services.

Other support mechanisms can include retention in work place with adjusted duties, flexible working including altered hours, redeployment including any re-training, disability leave and career breaks include redesigning the job, retraining and redeployment. For details on Disability Leave please see section 9.

9 Disability Leave

9.1 Disability Leave

All employees who have a disability using the definition in the Equality Act 2010 (see section 4) are entitled to disability leave.

The Equality Act 2010 specifically identifies the provision of leave as a reasonable adjustment where a disabled person needs to be absent from work for 'rehabilitation, assessment of treatment' (e.g. the routine assessment of hearing aids, hospital or specialist check-ups including monitoring of related equipment or treatment). However, not all employees with disabilities will necessarily need to take disability leave.

Certain conditions (e.g. arthritis, epilepsy, diabetes) can have variable effects, and may require occasional attendances for tests or treatments. Where a medical practitioner has certified that an employee has such a condition, absences required for planned tests,

treatment, or rehabilitation related to the condition will be recorded as disability leave and not as sick leave.

Disability leave will not be included for the purposes of assessing performance, promotion, attendance, selection for redundancy, and similar issues. To do so might discriminate against the employee with a disability.

People who have a disability but are in a period of remission (ie multiple sclerosis, cancer, epilepsy), still qualify as disabled under the act and are entitled to disability leave.

Examples of reasons for planned disability leave include (but are not limited to):

- Hospital, doctors, or complementary medicine practitioners appointments (by accredited practitioner)
- Hospital treatment as an outpatient
- Assessment for such conditions as dyslexia, dyspraxia
- Hearing aid tests
- Training with guide or hearing dog
- Counselling/therapeutic treatment
- Physiotherapy/Occupational Therapy/Speech and Language Therapy
- Assessment for diabetes, HIV
- Patient education

A longer block of disability leave might also be appropriate. Some examples of longer disability leave include (but are not limited to):

- A period of time off work while reasonable adjustments are made at work
- To allow an employee with either a newly acquired disability, or where there has been a significant change in the condition, to make changes inside and outside work, in order to accommodate their disability where there is a need for substantial changes to made.

The appropriateness and length of time for Disability Leave must be agreed with HR.

9.2 Disability Leave and Sick Leave

Disability leave is distinct from sick leave; any periods of leave required for assessment, treatment, or rehabilitation will be recorded as Disability Leave.

9.3 Procedure for Agreeing Disability Leave

Planned Disability Leave is agreed in advance. It may be a number of individual days each year that a disabled person needs. This would be for treatment, rehabilitation or assessment related to their disability and the employee should advise his/her line manager of the proposed time of the appointment/s as soon as possible and must produce an appointment card or letter if asked. Where there are a series of appointments for regular and ongoing treatment, acceptable arrangements need to be approved by the line manager for handling these.

Where planned Disability Leave is needed, reasonable notice must be given, and agreement reached on the number of days and date/s of the leave. Please refer to your H R Manager for advice on the appropriate application of Disability Leave.

Where Disability Leave is required to allow an employee with a newly acquired disability, or where there has been a significant deterioration of a condition, to make changes inside and outside work, agreement must be reached with a HR manager regarding the appropriateness and duration of such leave.

A Disability Leave Request form appendix B must be completed for each period of Disability Leave, and line managers should ensure that a copy is placed on the employee's personal file.

Where planned Disability Leave is agreed, it will be reviewed on a regular basis to assist in planning of services and staffing.

Employees who acquire a disability, or whose impairment or circumstances change, may request a review of their Disability Leave and/or other reasonable adjustments at any time.

The amount and duration of planned disability leave will be recorded on the Disability Leave Request Form.

Disability Leave will be recorded on the Electronic Staff Record system when the facility permits.

Time spent on Disability Leave is counted as continuous service for all contractual benefits, including accruing annual leave, sick leave, and pension rights.

Abuse of the Disability Leave Scheme is a serious disciplinary offence, and will be dealt with under the Disciplinary Procedure.

9.4 Other Contractual Issues

Where required, consultation will take place at a local level about the impact of a member of staff taking disability leave and this will be recorded on the reasonable adjustment form....

Time spent on disability leave is counted as continuous service for all contractual benefits, including accruing annual leave, sick leave, pension rights and bonus.

Medical information about employees will be kept strictly confidential unless they agree to disclosure. Its use will conform to Part 4 of the Information Commissioner's Data Protection Act Employment Practices Code (Information About Workers' Health). Where a manager makes a referral to Occupational Health, a report will be sent to them by the occupational health practitioner.

The amount and duration of planned disability leave will be recorded when it is actually taken, using the designated forms.

Appeals about the amount of disability leave allowed, on correctly following the procedure, or on other aspects of this agreement will be dealt with under the grievance procedure.

Abuse of the disability leave scheme is a serious disciplinary offence and will be dealt with under the disciplinary procedure.

10 Information and Support Mechanisms

In support of this policy the Trust can draw upon legislative guidelines, government schemes and internal and external sources of information.

The following are useful reference points:

- Occupational Health
- Employee Assistance Programme
- Human Resources
- Trade Union Representatives
- Access to Work Scheme: a government employment service that enables people to access a grant to help with adjustments*
- Disability Employment Advisers in Job Centre Plus*
- Building Regulations*
- Employers Forum on Disability*
- Healthwatch Wirral signposting service – signposting facility to community organisations*

For contact details please refer to the Trust's main intranet pages and for those with * refer to the Diversity and Inclusion section of the Trust's intranet.

11 References

Diversity and Inclusion Strategy 2018 - 2022

Health and Wellbeing Plan

Attendance Management Policies

Disability Confident Employer Scheme, published July 2014; updated November 2016

<https://www.gov.uk/government/collections/disability-confident-campaign>

1 Appendix A

Identification of disability or long-term health condition

- Discussion with manager
- Referral to Occupational Health (if not done so already)
- Refer to GP (if not done so already)
- Refer to Trust's Disability and long-term health condition policy

Identification of support / adjustments needed

- Occupational health advice considered
- Specialist / GP advice considered
- Refer to Disability and long-term health condition policy
- Reasonable adjustment planning form & Personal emergency egress planning (PEEP form) to be completed
- Access to Work Workplace Assessment to be requested where necessary
- Identify any additional support e.g. counselling, mentor, staff network support
- Discussion with manager (which may also include staff side and Human Resources)

Implementation of support / reasonable adjustments

- Any support / reasonable adjustments identified - agreement reached and plan put in place where necessary and a review date agreed

Identification within the Trust

- Disability or long-term health condition recorded on individual's ESR record
- Where applicable, reasonable adjustment plan completed and sent to Diversity Lead
- % staff monitored regularly via Steering Group and Workforce assurance process

Ongoing identification / regular review of support / adjustments

- Managers to ensure regular reviews of those with a disability or long-term health condition
- Managers to ensure regular reviews of staff with reasonable adjustment plans
- Managers to copy plans to Diversity and Inclusion Lead for monitoring
- Trust to monitor number of staff with a disability or long-term health condition
- Trust to monitor number of staff with reasonable adjustment plans in place

Disability and Long-Term Health Conditions Leave Request Form

This form should be used by employees to request approval for any periods of leave required for assessment, treatment, or rehabilitation in connection with a disability or long-term health condition as defined under the Equality Act 2010, also detailed in section 4.

Please note that this form must be completed for every period of disability leave, a copy will be kept on your personal file.

Once completed, your request should then be discussed with your line-manager. If however you are/feel unable to complete the form, your request should be discussed directly with your line manager as soon as possible.

Please provide as much information as you can.

Name: **Designation:**

Department / Ward:

Reason for Request: (tick as appropriate)

☐ Treatment

☐ Tests / Assessment

☐ Rehabilitation

Please describe:

.....

.....

No. of days requested: **Dates:**

.....

Signed: **Date:**

To be completed by the line-manager (after consultation with the Human Resources Manager and Occupational Health Department, if appropriate)

Please tick as appropriate	
<input type="checkbox"/> Request Approved Number of Days: Dates:	<input type="checkbox"/> Request Not Approved Reason:
Name: Designation: Signed: Date:	

Once completed please send a copy of this form to the H R Department

Cc	Employee	date sent:
	H.R.	date sent:
	Personal file	date sent:

Reasonable Adjustment Planning Form

Wirral University Teaching Hospital NHS Foundation Trust is committed to supporting staff with disabilities or long-term health conditions and to also ensuring its obligations under the Equality Act 2010.

This form is designed to facilitate an effective conversation with your manager / Trust representative regarding the identification and implementation of reasonable adjustments that may be required to support you in your role.

This form should be reviewed by the staff member and if support has been sought to do so, details of the person(s) concerned should also be included. Where staff need additional support to review this document, this should be highlighted as soon as possible in order that alternative arrangements and support can be made.

Employee Name: **Position:**

Department: **Completed on (date):**

Please provide details of anyone else supporting the completion of this form:

Name: Position:

Department: Date:

1. Please could you tell us the nature of your disability or health condition:



2. Are there any recommendations from health care professionals or others (e.g. from Occupational Health, Human Resources) that we need to be aware of?



3. Is there anything we could do that could support you at work?



4. Do you need the adjustment permanently ☐ or temporarily? ☐

If temporary, when would you require the adjustment until?

5. Do you feel you require any additional support or assistance in the event of a fire at work? If so, please detail:



(NB: If you have answered the question above, your manager will subsequently complete a Personal Emergency Egress Plan (PEEP) with you to ensure adequate support is available)

6. Are you a new starter to the Trust? Yes ☐ No ☐ if no, go to no.7

If yes, is there any additional support you may require to assist you through the Trust's welcome programme (please note that the programme includes classroom based sessions and computer based training).



7. Please detail any other information you feel may be relevant:



Employee Declaration *(employee to sign)*

The contents of this form should be discussed with your line manager or identified Trust representative and an agreement reached on the adjustments to be made. Once agreed, a letter will be sent to you confirming the arrangements and will be reviewed on a regular basis. If your circumstances do change however, please contact your line manager or Trust representative to discuss as soon as possible.



Employer Declaration *(manager to sign)* Date

The information in this form has been reviewed and a follow up letter will be sent to confirm the outcome of our discussions

Name Designation.....

A review will take place on / no later than *(delete as applicable)*.....

Personal Emergency Egress Plan (PEEP)

Management Guidance

Aim

The aim of this questionnaire is to provide information that will assist staff or visitors with a disability or health condition, their line managers and other staff who have a responsibility for the safe evacuation of people from the workplace. Using the information obtained from the completed questionnaire it should be possible to identify what must be done to ensure that a plan is prepared that will support the individual concerned in safely evacuating the building in an emergency.

Scope

The PEEP form applies to anyone with a condition (temporary or permanent) that could restrict them from carrying out an unaided evacuation, using the designated emergency escape routes provided within the building they are occupying.

For example a person in a wheel chair, a person with asthma or a person with a broken leg in plaster.

How to complete

A personal emergency evacuation plan (PEEP) should be established with the co-operation of the individual concerned. The aim is to be sensitive to the needs of staff and to ensure that the dignity and safety of the member of staff is maintained at all times.

All members of staff with a disability or health condition that might affect their ability to evacuate the building in an emergency should participate in a risk assessment that will determine the arrangements necessary to ensure their safe and speedy evacuation. This questionnaire may be used as part of the risk assessment process.

If we are to provide an evacuation plan that is suitable for the individual we need to gather as much information as we can.

Think of the person first and the disability / health condition second. Sensitive use of language can help reinforce the person's first impression of our ability to support them in an emergency.

Listen to what people say, don't assume they have the answers to their evacuation needs. The individual may not have any knowledge or experience of evacuation techniques or equipment.

A suitable plan should be negotiated, taking into consideration what the building, management and individual can offer. It should not be automatically assumed that a disabled person or person with a long-term health condition cannot leave the building independently.

Individuals should be consulted about their evacuation plan, given information about the building systems and their opinions and experience should be sought and respected.

Individuals should not be put under any pressure to do more physically than they would generally be able to achieve, or they may be afraid that back-up systems and support will not be made available to them.

It should be made clear to individuals that the circumstances of escape are considered to be exceptional.

The individual may require assurances that, if they volunteer what they might do in an emergency, will not constitute grounds for the removal of any support at other times.

It is essential that training is provided to staff so that they are aware of what techniques or equipment can be used.

Any member of staff assigned to assist in any supported evacuation need to undergo training on a regular basis.

The individual should be encouraged to view the training undertaken by staff in order to build up confidence that they will be safe during an evacuation.

Who should complete?

This risk assessment is to be carried out by the line manager in collaboration with the individual following the completion of a reasonable adjustment planning form.

Advice is available from the Fire Officer on ext. 4252.

Personal Emergency Evacuation Plan

Name of Individual Department.....

Name of Line Manager or Designated Manager

Person Completing the questionnaire
(if different from above)

Date completed..... Contact Details

Contents

1. Work Location and Details
2. People with a Visual Impairment
3. People with a Hearing Impairment
4. People with Impaired mobility and Wheelchair Users
5. Wheelchair Users
6. Designated Assistance / Buddies
7. Personal Evacuation Plan

Section 1 Work Location and Details (Staff Only)

A	Where are you based for most of the time? Please give the building, the floor and the room number.
B	Do you routinely use more than one location in this building? Yes <input type="checkbox"/> No <input type="checkbox"/>
	If you have answered YES to the previous question, please provide any further details below.
C	If you have answered yes to question 1B, have any arrangements been made to support your evacuation from that building or buildings? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
	Please provide any further details below.
D	Do you routinely work or visit other buildings? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
E	If you have answered YES to the previous question, please list the addresses of the building(s) below, together with any further details you may wish to add.

Please add any other information that may assist in the risk assessment process and in making your personal evacuation plan:

Section 2 – People with a Visual Impairment

A	<p>Are you aware of the emergency evacuation procedures that operate in the building?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/></p>
	<p>If you have answered NO to the previous question, please provide any further details below.</p>
B	<p>Are the signs that indicate the emergency escape routes and exits clear enough for you to see?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/></p>
	<p>If you have answered NO to the previous question, please provide any further details below.</p>
C	<p>Are you able to follow the emergency evacuation procedure and use the escape routes with other people to exit the building and proceed to the assembly point?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/></p>
D	<p>Do you consider that you need assistance to get out of the building in an emergency?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/></p>
E	<p>Could you raise the alarm if you discovered a fire?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/></p>
F	<p>Do you have any other disability that should be considered as part of this risk assessment?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/></p> <p>If yes, please detail:</p>

Please add any other information that may assist in the risk assessment process and in making your personal evacuation plan.

Section 3 – People with a Hearing Impairment

A	Are you aware of the emergency evacuation procedures that operate in the building? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
B	Do you quickly become aware when the fire alarm sounds? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
C	Are you able to follow the emergency evacuation procedure and use the escape routes with other people to exit the building and proceed to the assembly point? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
D	Do you consider that you need assistance to get out of the building in an emergency? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
E	Are you alone for any time during your visit to the facility? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
F	Could you raise the alarm if you discovered a fire? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
G	Do you have any other disability that should be considered as part of this risk assessment? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
	If you have answered YES to the previous question, please provide any further details below.

Fire Alarm Sounders and Warning Devices

I am, or I consider I would need to be, informed of an emergency requiring evacuation by the provision and operation of:

The existing alarm system:	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Pager device:	already provided <input type="checkbox"/>	required <input type="checkbox"/>
Visual alarm system:	already provided <input type="checkbox"/>	required <input type="checkbox"/>
Other (please specify):		

Please add any other information that may assist in the risk assessment process and in making your personal evacuation plan:

Section 4 – People with Impaired Mobility and Wheelchair Users

A	Are you able to follow the emergency evacuation procedure and use the escape routes with other people to exit the building and proceed to the assembly point? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
B	Do you have sufficient mobility to follow the escape route and exit the building unaided even though you may take longer? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
C	Do you consider that you need assistance to get out of the building in an emergency? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
D	Do you find stairs difficult to use? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
E	Are you alone for any time during your visit to the facility? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
F	Could you raise the alarm if you discovered a fire? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
G	Do you have any other impairment that should be considered as part of this risk assessment? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>

Please add any other information that may assist in the risk assessment process and in making your personal evacuation plan.

Wheel Chair Users

Using lifts and other facilities, wheelchair users and other people who may have limited mobility will have access to most parts of the building. During the time they visit the facility, people may move to other floors. In an emergency, lifts and escalators are usually prohibited from being used and the only vertical escape is by using the stairs. In such circumstances, the person in the wheelchair may find themselves alone with the possibility that colleagues are unaware of their location within the building.

A	Would you be able to be evacuated using your chair as a carrying chair and with the assistance of buddies Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
B	Would you be able to transfer yourself unaided from your own wheel chair to another chair, before being evacuated? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
C	With the assistance of buddies, would you be able to transfer yourself from your own wheel chair to another chair, before being evacuated? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
D	Would you be able to evacuate the building and proceed to the assembly point with the assistance of a Buddy/Buddies? Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know <input type="checkbox"/>
E	If you have answered NO or DON'T KNOW - to any of the above questions, please describe the form of assistance you feel you would require:

Please add any other information that may assist in the risk assessment process and in making your personal evacuation plan:

Section 6 - Designated Assistance / Buddies

A	Are there any arrangements currently in place for a designated person to act as your buddy in assisting you to evacuate the building in an emergency?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Don't Know <input type="checkbox"/>
B	Is the arrangement with your Buddy/Buddies a formal arrangement that has been incorporated for you in a Personal Emergency Evacuation Plan?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Don't Know <input type="checkbox"/>
C	Are you always in easy contact with those designated to help you?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Don't Know <input type="checkbox"/>
D	In an emergency, could you at all times contact the person(s) in charge of evacuating the building(s) in which you are visiting and tell them where you were located?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Don't Know <input type="checkbox"/>

Please add any other information that may assist in the risk assessment process and in making your personal evacuation plan.

[illegible]

Designated Assistance / Buddies

The following people have been designated to support the implementation and operation of this plan in an emergency. They have received training and instructions that will enable them to safely and effectively perform the tasks required to support this plan

Please provide the name and contact details for buddies identified:

Section 6 – Personal Evacuation Plan

Methods of Assistance:

Equipment Provided:

Evacuation Procedure: (A step-by-step account, beginning from the first alarm).

Remarks

PEEP prepared by _____ Date: _____

Role: _____

Copy of PEEP form sent to Fire Officer on (date) _____

REVIEW

Date	Name	Action	Remarks

Strictly Private & Confidential

Click here to enter text.
Click here to enter text.
Click here to enter text.
Click here to enter text.
Click here to enter text.

Click here to enter a date.

Dear [Click here to enter text.](#),

RE: Outcome of Reasonable Adjustment Review Meeting

Thank you for our recent discussion / meeting [\(delete as appropriate\)](#) with [Click here to enter text.](#) On [Click here to enter a date.](#)

The Trust is committed to supporting staff with disabilities and long-term health conditions and I am pleased that we were able to discuss your circumstances in more detail and whether any reasonable adjustments may be required in order to best support you within your role.

Please therefore accept this letter as confirmation of our discussion and any agreements reached.

I acknowledge your current circumstances whereby

- i) you have been recently diagnosed with....
- ii) You have made me aware of your current health condition / circumstances
- iii) Your health condition / circumstances have changed
- iv) Other.. . please detail

[Please include the appropriate circumstances from above and summarise the nature of the disability / long-term health condition and a description of the impact \(if any\) identified by the employee..](#)

Thank you for taking the time to complete the reasonable adjustment planning form / review the reasonable adjustments planning form with me [\(delete as appropriate\)](#) as this is aimed at identifying potential areas where reasonable adjustments could be considered.

As discussed, I acknowledge that you feel no adjustments are required to support you at this time / I acknowledge that adjustment(s) are required and therefore confirm the following: [\(delete as appropriate\)](#)

With effect from [Click here to enter a date.](#) [Click here to enter text.](#) [\(provide details of adjustments agreed\)](#)

In addition, the following has / will be arranged:

[Click here to enter text.](#)

Include any referrals to Occupational Health, Access to work or other support / specialist services. Also include any additional training or elements discussed.

We also discussed:

Provide details of additional areas of discussion including concerns from either side, other recommendations / comments deemed appropriate.

The Trust's Personal Egress Plan (PEEP) was also discussed, however deemed unnecessary at this stage / and a plan agreed. A copy of which is attached (delete as appropriate)

It was agreed that the adjustment(s) would be on a temporary / permanent (delete as appropriate) and include any specific reasons if temporary) basis.

In order to ensure appropriate support is in place for you and that adjustments are effective, these arrangements will be reviewed on / no later than Click here to enter a date. (no more than 12 months from the date of the meeting). Should either party feel however, that a review is required sooner, this will therefore then be arranged as soon as possible.

As also discussed, the Trust has a range of support services available to staff and therefore please do not hesitate to get in touch with any of the following, as deemed necessary:

- Occupational Health Team, Clatterbridge Hospital 0151 482 7635 (direct line) or 0151 334 4000 extension 5440.
- Employee Assistance Programme – 0800 783 2808
- Human Resources Team – Ext 5222
- Staff side colleagues (specific union details can be found via the Trust's intranet pages or via Switchboard)

Finally, as discussed, your Electronic Staff Record will also now be updated to reflect our discussion.

Once again, many thanks for meeting. If however circumstances change before our agreed review date, or there is any further help or support you require, please don't hesitate to let me know.

Yours sincerely

Click here to enter text.

Click here to enter text.

Cc: Human Resources
Personal File

Equality Analysis

The Equality Analysis (EA) form should be completed in the following circumstances:

- All new policies
- All policies subject to renewal
- Business cases submitted for approval to hospital management impacting on service users or staff
- Papers submitted to hospital management detailing service redesign/reviews impacting on service users or staff
- Papers submitted to Board of Directors for approval that have any impact on service users or staff

Title	Disability Policy		
Agenda Item/Policy Reference	Policy No. 154		
Lead Assessor	Sharon Landrum, Diversity & Inclusion Lead		
Date Completed	9 th December 2019		
What groups have you consulted with? Include details of involvement in the EA process	Staff in area concerned	X	Staff side colleagues X
	Service users	<input type="checkbox"/>	HR X
	Other	<input type="checkbox"/>	Other X
	Reviewed by staff network members, Diversity & Inclusion steering group and designated HR managers Will be reviewed by formal consultation process and also Occupational health		
What is being assessed? Please provide a brief description and overview of the aims and objectives			
The widening of the disability leave policy to encompass additional guidance and support for staff with a disability and their managers			
Who will be affected (Staff, patients, wider community?)			
Staff with a disability or long-term health condition and those involved in supporting them.			

Please note the results of this Equality Analysis will be published on the Trust website in accordance with the Equality Act 2010 duties for public sector organisations

Section 1 should be completed to analyse whether any aspect of your proposal/document has any impact (positive, negative or neutral) on groups from any of the protected characteristics listed overleaf.

When considering any potential impact you should use available data to inform your analysis such as PALS/Complaints data, Patient or Staff satisfaction surveys, local consultations or direct engagement activity. You should also consult available published research to support your analysis. For further support with this, please refer to the Library and Knowledge Service accessible via the Trust's intranet site or switchboard.

Section 1 – Initial analysis

What is the impact on the equality groups below?		
Positive: <ul style="list-style-type: none"> • Advance equality of opportunity • Foster good relations between different groups • Address explicit needs of equality target groups 	Negative: <ul style="list-style-type: none"> • Unlawful discrimination, harassment and victimisation • Failure to address explicit needs of equality target groups 	Neutral: <ul style="list-style-type: none"> • It is quite acceptable for the assessment to come out as Neutral impact • Be sure you can justify this decision with clear reasons and evidence if you are challenged
Equality Group	Any potential impact? Positive, negative or neutral	Comments / Evidence (For any positive or negative impact please provide a short commentary on how you have reached this conclusion)
Disability (inc physical and mental impairments)	Positive	The policy aims to widen support and information available for those with a disability and /or long-term health condition.
Age	Positive	The policy seeks to support all those with a disability and long-term health condition irrespective of additional characteristic
Race (all ethnic groups)		
Religion or belief		
Sexual Orientation		
Pregnancy & Maternity		
Gender		
Gender Re-assignment		
Human Rights		
Other e.g. Carers		

If you have identified any **negative** impact you should consider whether you can make any changes immediately to minimise any risk. This should be clearly documented on your paper cover sheet/policy document detailing what the negative impact is and what changes have been made.

If you have identified any **negative** impact that has a high risk of adversely affecting any groups defined as having a protected characteristic then please continue to section 2.

In all cases - you should submit this document with your paper and / or policy in accordance with the governance structure with copies to wih-tr.EqualityWUTH@nhs.net for monitoring purposes.

Section 2 – Full analysis – Not required

Following completion of the full analysis you should submit this document with your paper and or policy in accordance with the governance structure.

You should also send a copy of this document to wih.tr.equalityWUTH@nhs.net for monitoring purposes.

Consultation, Communication and Implementation

Consultation Required	Authorised By	Date Authorised	Comments
Equality Analysis (1)	Finola O'Donnell	4 July 2018	Screened for relevance: Full impact assessment not required.
Equality Analysis (2)	Sharon Landrum	9 Dec 2019	Completed: Full impact assessment not required.
Policy Author Checklist	Policy Group	12 June 2018	
Other Stakeholders / Groups Consulted as Part of Current Version Development	Partnership Steering Group		
Trust Staff Consultation via Intranet	Consulted through collective bargaining mechanism		

Date notice posted in the News Bulletin.	N/A	Date notice posted on the intranet	19 November 2020
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Describe the Implementation Plan for the Policy / Procedure (Considerations include; launch event, awareness sessions, communication / training via DMTs and other management structures, etc)	By Whom will this be Delivered?
HR Managers to present the policy and procedure at Divisional and Corporate Services Management Teams (DMTs and CSMTs) and members of these Teams are responsible for updating their staff in their Division/Department. All new staff made aware of this policy and procedure at induction.	HR and Organisational Development Department
December 2019 – Revised policy will be reviewed via the Disability Staff Network and launch event planned in March 2020.	D&I Lead / HR and Wellbeing Lead

Version History

Date	Ver	Author Name and Designation	Summary of Main Changes
19/04/09	1	Barbara Lewis, Senior HR Manager	New Policy
11/04/11	2	Lawrence Osgood, Principal OD Manager	Additional text to definition – Rehabilitation and Recuperation
19/09/12	3	Lawrence Osgood, Principal OD Manager	Removal of references to the Trust disability adviser. Revise references to Equality Act 2010.
21/7/15	4	Lawrence Osgood, Assistant Director of HR	Refresh of policy, no changes to process.
11/06/18	5	Sharon Landrum, E&D Adviser	Review and refresh of policy with minor changes included. Inclusion of reference to new Diversity and Inclusion Strategy, removal of old two tick scheme
01/06/20	6	Sharon Landrum, D&I Lead	Widening of policy to focus on disability as a whole, but still encompasses disability leave.

Monitoring Compliance with the Policy

Describe Key Performance Indicators (KPIs)	Target	How will the KPI be Monitored?	Which Committee will Monitor this KPI?	Frequency of Review	Lead
No upheld grievances in relation to the inappropriate application of this policy	100%	Performance Report	Workforce Steering Group	Annually	Executive Director of Workforce
Staff with a disability to have up to date reasonable adjustments record plans in place where appropriate	100% by March 2022	Performance Report	Workforce Steering Group	Annually	Executive Director of Workforce
Reasonable adjustment records to be reviewed	100% by March 2022	Deep dive	Workforce Steering Group	Annually	Executive Director of Workforce

Performance Management of the Policy

Who is Responsible for Producing Action Plans if KPIs are Not Met?	Which Committee Will Monitor These Action Plans?	Frequency of Review (To be agreed by Committee)
	Workforce Steering Group	Annually