What to write down, and where it lives

Six lines, filled in the day you agree something, so the next manager isn't starting from scratch.

WHAT THE PERSON ASKED FOR, IN THEIR WORDS

WHAT YOU AGREED, OR THE PART YOU AGREED

ANYTHING YOU'RE TRIALLING, AND THE REVIEW DATE

WHAT YOU COULDN'T AGREE, AND WHY

WHO DECIDES IF YOU'RE AWAY

WHERE THIS LIVES, AND WHO CAN SEE IT

An example, filled in

WHAT THE PERSON ASKED FOR

"Could I work from home on Mondays? I have a hospital appointment every Monday morning."

WHAT YOU AGREED

Works from home on Mondays and joins the team meeting by video.

TRIAL AND REVIEW DATE

Six-week trial from 3 March. Reviewed 14 April, still working. Next review in October.

WHAT YOU COULDN'T AGREE, AND WHY

Nothing refused.

WHO DECIDES IF YOU'RE AWAY

Kamal, team manager. The head of service when Kamal is away.

WHERE THIS LIVES

The HR record. The person, their manager and HR can see it.

> **Look again** on the review date, and when the role, the manager or the person's situation changes. Ask "Is this still working for you, and has anything changed?"

Going further. If your records are scattered, or nobody is sure who decides, I review adjustments policies and processes and show you where requests get stuck. hughokeeffe.com/work-with-me

From The Small Print, a free monthly session for managers and HR on what to do when disability comes up at work. Hugh O'Keeffe, Disability, Access and Inclusion Consultant. hughokeeffe.com. I'm not a lawyer and this isn't legal advice. Use it as a way in, and get advice on anything already in dispute.