Workplace Adjustments — Practical Template

Employee and manager discussion and agreement form | Depression and related workplace needs

Use this template to identify barriers, discuss possible adjustments and record what is agreed. It can be completed together or prepared individually before a meeting. Focus on the impact at work; detailed medical information is not required.

1. Basic details

Employee name / preferred name

Role / team

Manager or agreed contact

Date of discussion

2. What is difficult at work?

Tick any relevant areas and describe their impact. These are examples, not a diagnostic checklist.

■ Starting tasks or organising priorities

■ Concentration, memory or processing information

■ Sleep disruption, fatigue or morning routines

■ Meetings, conversations or written communication

■ Managing workload, deadlines or changes

■ Working environment, interruptions or sensory demands

■ Travel, working hours or attendance

■ Other: _____

Describe the work-related barriers (what happens, when, and what would help)

Exploring Practical Adjustments

3. Adjustments to consider

Select options to discuss. Any adjustment should be appropriate to the role and agreed individually.

- ■ Flexible start/finish times or adjusted hours
- ■ Home or hybrid working where practical
- ■ Agreed breaks and pacing of demanding tasks
- ■ Written instructions, checklists and reminders
- ■ Meeting agendas in advance and written follow-up
- ■ Additional time to process information or respond
- ■ Reduced interruptions or access to a quieter space
- ■ Clear priorities and smaller task stages
- ■ Temporary workload or deadline adjustments
- ■ Phased return or temporary changes to duties
- ■ Regular agreed check-ins with a named contact
- ■ Occupational health discussion or other support

4. Record each proposed adjustment

Adjustment 1: What will change?

Who will arrange it, and by when?

Adjustment 2: What will change?

Who will arrange it, and by when?

Adjustment 3: What will change?

Who will arrange it, and by when?

5. What does success look like?

How will we know these adjustments are helping?

Agreement & Review

6. Communication preferences

■ Email or written messages

■ One-to-one conversation

■ Meeting information in advance

■ Written summary of agreed actions

■ Other: _____

How and when will we check in?

7. Review plan

Start date for adjustments

Review date

What should happen if an adjustment is not working?

8. Agreed actions

Employee actions (if any)

Manager / employer actions

9. Confirmation

Signing records the discussion and agreed arrangements. It does not require disclosure of further medical details.

Employee signature / date (optional)

Manager signature / date (optional)

Keep this document securely, share it only with appropriate people, and review when needs change. In the UK, depression may qualify as a disability under the Equality Act 2010 where the legal criteria are met; reasonable-adjustment duties depend on the circumstances. This template is guidance, not legal or clinical advice.