Managing the Adjustment Conversation Record

Guidance

Guidance – Considering Adjustments
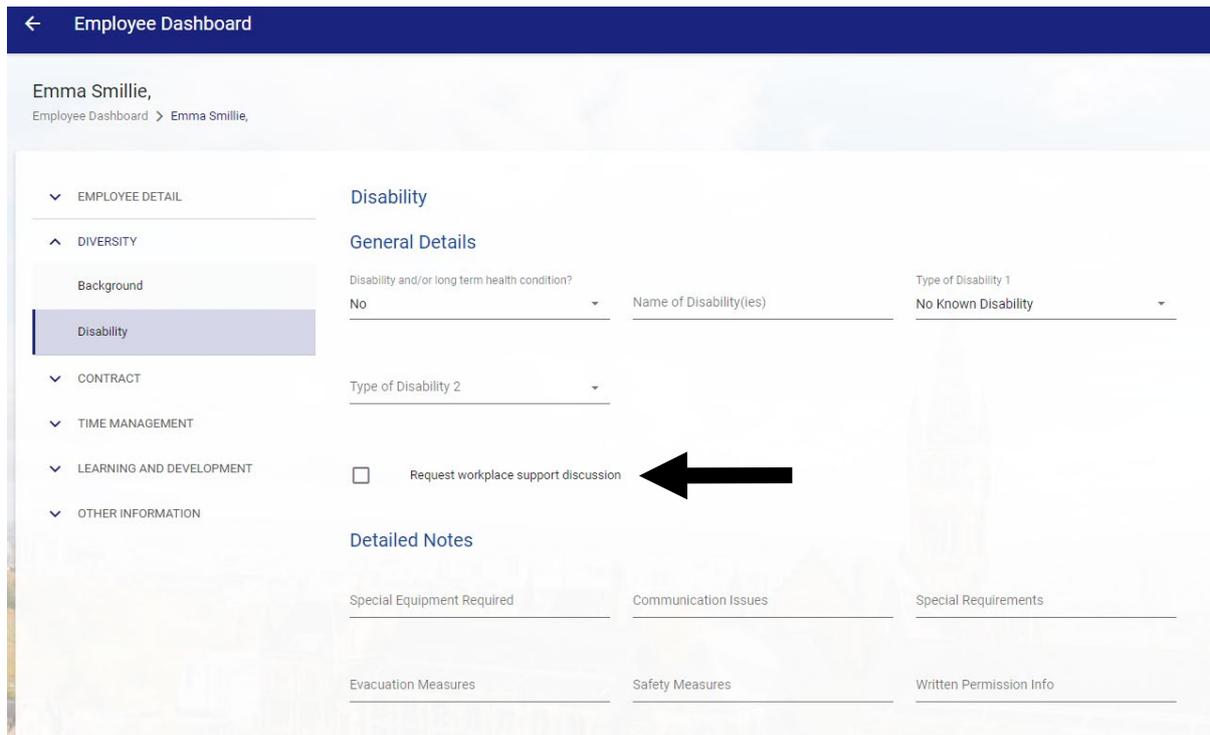
Contents

Step 1: Notification of Adjustment Conversation

The workflow within the University Helpdesk is triggered when a colleague indicates via the **Disability** tab in **People XD** (formally CoreHR**)** that they would like to request an **Adjustment Conversation**.

The **Disability** tab in People XD can be found by clicking on '**My Profile**' (also available by clicking into your picture) and selecting the **Diversity** tab.

The above image is shown below zoomed in.

If the colleague updates information regarding a disability <u>but does not</u> request an Adjustment Conversation via the box, there is an automated e-mail generated (to the colleague only) which signposts to the online toolkit and highlights the option of requesting an Adjustment Conversation in the future.

Step 2: Notification Sent: Line Manager

When the colleague does click the box to request an Adjustment Conversation, an **e-mail** is sent to their line manager and to the local People and OD team automatically.

Example text of the e-mail sent to the line manager is below:

"Dear [MANAGER NAME]

[COLLEAGUE NAME] has updated their disability information via self-service and has requested an Adjustment Conversation. You should now arrange a meeting to discuss this further and to consider any workplace adjustments as appropriate. It is important that any required adjustments are implemented as soon as possible after being agreed and therefore early dialogue is valuable in progressing this.

A range of guidance is available to support with this in the Support for Disabled and Neurodivergent Colleagues Toolkit and within the guidance on considering adjustments in particular.

Please login to manager self-service using your Staff GUID and password, and click on the My Items tile on the main screen; the Adjustment record should be there, with [COLLEAGUE NAME] in the title. This record can be used to capture the details of dialogue which has taken place . You can also record if adjustments are required and set a reminder to review arrangements (as agreed). Further supporting information is available in the guidance on tracking adjustment conversations.

If you need help or clarification, you can use the 'Contact EDU' button to send them a message, or use the button to access our comprehensive toolkit online.

You may also seek support from your local People & Organisational Development Team."

Step 3: Notification Sent: People & OD

The notification that a colleague has requested an Adjustment Conversation comes through as a **Task** to the local team with instructions to assign an owner of the record. Example text is below:

The Task below has been assigned to your team:

Task Details (action required from you):

Task relates to: UofG_HR_DisabilityRecord
Summary: Task Summary
Details:
A Disability Adjustment record has been created for Test McTesterson ().

Please assign an owner to the record and check that the Manager details are complete/correct.

+ Open the Person workspace in Ivanti
+ Search for the employee using their name or staff number
+ Open the Disability Record tab.

If the Manager details are missing/incorrect and they look correct on XD, contact the Ivanti team

Info:
+ The target for completing Tasks is 3 working days
+ If this Task cannot be completed now, you can use the Waiting status to let the person who assigned the Task know.

Step 4: Adjustment Meeting takes place and Record is updated

When the line manager is notified by the system that their colleague has requested an Adjustment Conversation they should arrange a meeting as soon as possible to discuss this further and to consider any workplace adjustments as appropriate. It is important that any required adjustments are implemented as soon as possible after being agreed and therefore early dialogue is valuable in progressing this.

A range of guidance is available to support with this in the Support for Disabled and Neurodivergent Colleagues Toolkit and within the guidance on considering adjustments in particular. Further information on the support available is highlighted at the end of this document.

Once the Adjustment Conversation has taken place, details can be documented in the colleague's **Adjustment Record** in the University Helpdesk system. To access this:

1. The line manager logs into the Helpdesk using their staff role

2. The adjustment record is accessed via the '**My Items**' tab
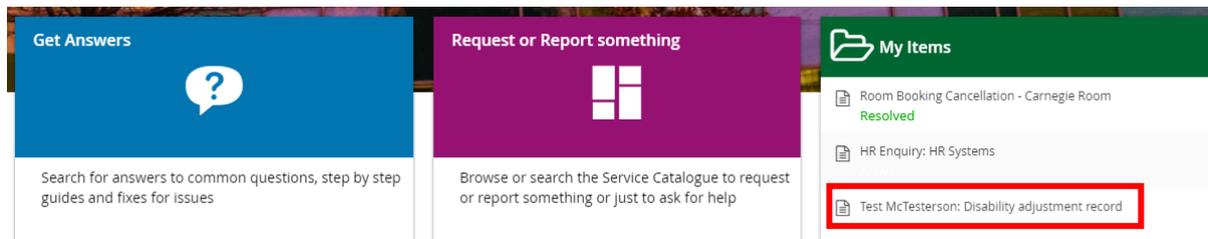
The '**My Items**' tab can also be accessed by clicking the three lines on the top left of the screen and selecting '**My Items**' from the burger menu which is displayed.
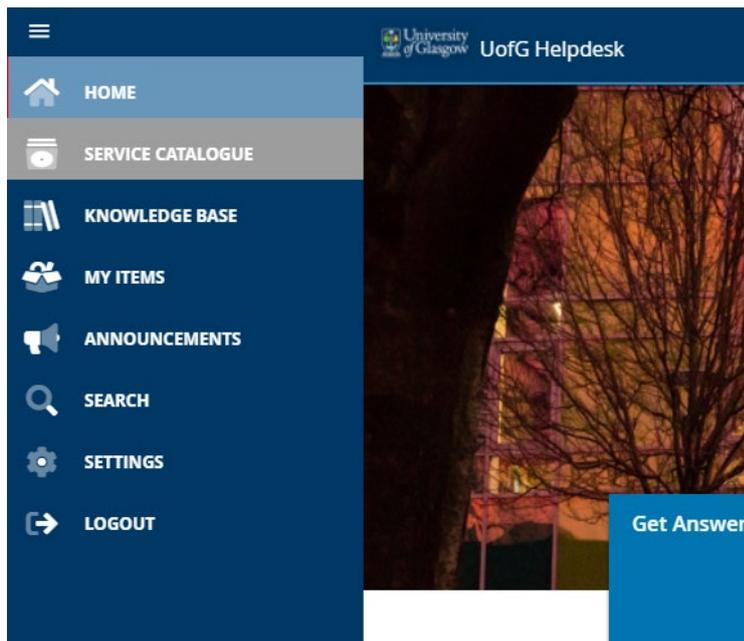
3. Clicking the link with the colleague's name opens the record

Has the Meeting Taken Place

Outcome

Details

The line manager can then indicate from the dropdown menus whether the meeting has taken place and the outcome. Details can be added in the box provided and there is the facility to upload an attachment – such as the **Reasonable Adjustment Passport** – using the '**Attach**' button provided.

The **Equality & Diversity Unit** can be contacted using the button provided and a link to the toolkit on the University's website is also included if any part is needed for reference.

4. Sign off the record as complete and choose a suitable date for a review of the adjustments to take place.

Enter...

Enter a review date *   30/05/2023

OK   Cancel

The default suggested date is set at six months but any date can be chosen by clicking the calendar icon.

Next Steps: People & OD team

When the local P&OD team receives the **Task** notification that a colleague has requested an Adjustment Conversation they have **three working days** to log into the system as per the instructions in the **Task** and assign an **owner** for the **record**.

To assign an owner:

1. Log into the Helpdesk using your **HR Analyst** role

2. Click on the '**Person**' workspace at the top of the screen

3. Search for the name of the Person (this will be in the Task notification)

4. Open the Adjustment Record tab

5. Assign an owner from the dropdown list

This person will receive notifications if no action is taken by the line manager.

If no owner is assigned within the three days an escalation to the Equality & Diversity Unit is sent.

What happens after the record is signed off?

After the line manager and the colleague have agreed on a course of action and signed off the record, confirmation of the review date they have set will appear on the screen along with some details of the conversation.

Double-click below to open

Emma Smillie marked the record as Complete on 17.05.2022 Outcome: Adjustments made Details: Some adjustments were made. Review date has been set for 16.05.2023

Double clicking any of the boxes in the record opens the content in a format which some users may find easier to read.

View Notes

Summary   Note from Self Service

On: 17/05/2022 15:59

Emma Smillie marked the record as Complete on 17.05.2022

Outcome:
Adjustments made

Details:
Some adjustments were made.

Review date has been set for 16.05.2023

An e-mail is also sent to both the colleague and the line manager with the content for their reference.

The record becomes Read-Only at this stage until one week prior to the review date agreed, at which point it will be come editable and both the colleague and the line manager will receive an e-mail reminder to review the adjustments again.

If the record needs to be unlocked at any point this can be done by contacting the relevant local People and OD team.

The record remains accessible to both the colleague and the line manager at all times via the '**My Items'** tab.

Further Resources

Overall portal
https://www.gla.ac.uk/myglasgow/humanresources/all/health/disabilitysupport

Access to Work Info Sheet
https://www.gla.ac.uk/myglasgow/humanresources/all/health/disabilitysupport/accesstowork

Discussing Adjustments Portal
https://www.gla.ac.uk/myglasgow/humanresources/all/health/disabilitysupport/discussingadjustments

Considering Adjustments
https://www.gla.ac.uk/myglasgow/humanresources/all/health/disabilitysupport/discussingadjustments/consideringadjustments

Colleague Guidance
https://www.gla.ac.uk/myglasgow/humanresources/all/health/disabilitysupport/discussingadjustments/colleaguesupport

Examples of Adjustments
https://www.gla.ac.uk/myglasgow/humanresources/all/health/disabilitysupport/discussingadjustments/adjustmentsexamples

Having a constructive conversation
https://www.gla.ac.uk/myglasgow/humanresources/all/health/disabilitysupport/discussingadjustments/constructiveconversations

Systems Guidance Portal
https://www.gla.ac.uk/myglasgow/humanresources/all/health/disabilitysupport/systemguidance

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RAP Privacy Notice
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Reasonable Adjustments Passport
https://www.gla.ac.uk/media/Media_852587_smxx.docx

Access to Work Info
https://www.gla.ac.uk/myglasgow/humanresources/all/health/disabilitysupport/accesstowork/

Process Diagram
https://www.gla.ac.uk/media/Media_852495_smxx.pdf