



# Carer's Passport

## Personal when completed

The purpose of the passport is to enable a carer and their manager to hold a supportive conversation and document the flexibilities needed to support the carer in combining care and work. The aim is to minimise the need to re-negotiate these flexibilities every time an employee moves post, moves between departments or is assigned a new manager. This document belongs to the employee and their manager should have a copy.

This is designed to be a living document to be reviewed every year and in response to any changes in the nature or impact of the caring responsibilities.

In order to record an agreement in the passport, it is important that you follow the relevant departmental procedures. When a passport is reviewed (either an action or the passport overall), a manager changes, or an employee moves to a new role, the passport does not guarantee that the previously agreed arrangements will remain in place.

## Section 1

**Name:**

**Name of manager:**

## Section 2

### Overview of your caring responsibilities

This section should include:

- a summary of your caring responsibilities
- the impact this has on your working life
- any further information that may help your manager understand the impact your caring responsibilities have on you and your work.

## Section 3

### Overview of your role and team

## Section 4

### Flexibilities which would be helpful

This section deals with flexibilities specific to your current job which would help you combine caring and work. These are intended to inform your discussion with your manager.



## Section 5

### Flexibilities agreed between you and your manager

This section deals with flexibilities specific to your current job which would help you combine caring and work. Set out agreed actions with dates for implementation.

**Action agreed:**

**Date of implementation:**

**Date to review action:**

## Section 6

### Any other actions agreed at the meeting

This section might include for example contacting the employee assistance programme for counselling, the local council for a carer's assessment or [The Charity for Civil Servants](#) for information, support and/or financial help tailored to the carer's circumstances.

I consent to my manager keeping a copy of this passport.

**Employee signature:**

**Date:**

**Manager signature:**

**Date:**

**Date of next review:**



# Carer's Passport – Guidance

## Purpose

1. A carer's passport is essentially a conversation about the flexibility needed to combine work and care. This conversation involves balancing the needs of the employee with the needs of the business, within existing departmental policies.
2. It can help to create a supportive working culture where employees feel that they can talk about their circumstances in a safe environment. It can also help communicate existing workplace support for carers and encourage managers to apply policies more consistently across the organisation. It is also beneficial for the business as it keeps the employee in the workplace.
3. A carer is anyone who cares, unpaid, for a friend, partner or family member who due to illness, disability, a mental health problem or an addiction cannot cope without their support. The care they give is unpaid although they may be eligible for financial support, such as the carer's allowance. The carer's passport can be completed by any employee who has caring responsibilities which they believe could have an impact on their ability to work currently or at some point in the future.
4. The passport relies on sensitivity, leaving it ultimately down to the carer themselves to determine how much personal information they wish to share.
5. The passport has three functions:
  - to support a conversation between an employee and their manager about the flexibilities which would help the employee combine caring and work
  - to act as a record of that conversation and of the flexibilities agreed
  - to prompt a further conversation, on an annual basis, to check whether circumstances have changed and new flexibilities need to be considered.
6. The passport will be helpful when the employee changes manager, as it will help the new manager to understand the flexibilities previously agreed and avoid the need to begin the process again.
7. The passport is not designed to remove the need for employees to talk with their manager on a regular basis about the impact of their caring responsibilities on their day-to-day working life.



## Procedure

### Individual responsibilities

8. Completion of the passport is voluntary. You have complete control over the content and you retain ownership of the form throughout. We recognise that you may find it difficult to talk through your personal issues and challenges.
9. Complete your personal details and in sections 1-4 include as much detail as you feel is appropriate, and which you wish your manager to know about. Give a copy to your manager and arrange to meet to discuss the details.
10. The meeting will give you and your manager the opportunity to discuss the issues you have identified. You may find it helpful to talk through the following questions (this list is not exhaustive).
  - What are your caring responsibilities?
  - How do they affect your work?
  - What impact does work have on your caring responsibilities?
  - Do you already receive any support in work to help combine caring with work?
  - What further support would help you?
  - Do you need to apply for flexible working to continue your caring responsibilities?
  - How would you prefer to communicate with your manager if you are unable to come to work?
  - What would help ensure that the needs of the team/organisation continue to be met?
  - Do you need any support from occupational health, the employee assistance programme or external organisations?
  - Do you need any equipment from the department to support your combined role e.g. a mobile phone or laptop?
  - How do you expect your caring responsibilities to change in the future?
11. While it is up to you to decide how much detail to share, it is important that you give your manager enough information for them to understand your issues and challenges.
12. Any actions agreed and a review date should then be entered on the passport and a copy given to your manager. Remember that you will need to follow the procedures in the relevant departmental policy if, for example, you want to apply for flexible working.
13. You should review the passport if your circumstances or job role change and it should be reviewed at least every 12 months.

### Manager responsibilities

14. The Civil Service aims to create a climate in which employees are confident that they can disclose information, without fear of discrimination or harassment, about the challenges they



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face in combining caring responsibilities and work. As a manager, your actions and decisions are of great importance in considering any steps which might be taken to assist them in their work. The passport is designed to help you do this.

15. Managers should treat information contained in the passport and discussions with individuals about their caring responsibilities in the strictest confidence.
16. When you receive a passport from an employee, you should arrange a one-to-one meeting with that person as soon as possible. Prior to the meeting, you may wish to familiarise yourself with relevant departmental policies. The department's carers' charter provides links to help you do this.
17. It is for the individual to decide how much to disclose about their caring role. However, it is important that, as a manager, you are able to understand how it affects their day-to-day work and what you can do to support them. Managers have a responsibility to ensure that anyone wishing to complete the passport is given adequate official time to do so to meet their needs.
18. The kind of flexibilities you may wish to consider with your employee are set out in our carers' charter **[DN: departments to amend if the charter has not been adopted]**. You may wish to discuss:
  - options for flexible working including part-time and home working, compressed hours and job sharing
  - use of flexi time to cover appointments etc
  - arrangements for notifying you and making cover arrangements for immediate, short-term crises
  - any likely need for paid or unpaid special leave or an unpaid career break
  - any issues around working temporarily in a different location if the person being cared for does not live locally.
19. Agreements on these and other issues should be recorded in the passport and regular reviews set in place to discuss any changes.
20. Managers should refer to the relevant departmental policies, for example where the carer wants to change their working pattern.
21. It is important to remember that the passport belongs to the employee involved and is confidential. Should you move to another post, you should not pass the form to the next manager without the permission of the employee concerned. Nor should you send it to the manager if the employee moves post, unless they give permission.

### The Charity for Civil Servants

22. If you are completing a passport for the first time, you should use this template. If you would like some support in completing the template, The Charity for Civil Servants has developed a [Carer's Passport and Carer's Statement Digital Tool](#). When, as a carer, you complete this tool, you will be provided with a list of your answers which you can use to help you populate



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this template. In addition, you will receive a personalised Action Plan which contains a range of information and support.

23. If you have a carer's passport provided by The Charity for Civil Servants, you may want to transfer the contents onto this template. If you need to make amendments, you should use this template and transfer the relevant information from your Charity passport.