

In small businesses and micro-agencies—like the cafés, creative studios, and venues I’ve worked with in Brighton and Hove—it’s common for managers to handle everything themselves. This includes workplace adjustments, but without an HR department, things can get messy. You want to support your team with necessary adjustments but may worry about making the process too formal or intimidating for your staff. So, how do you document a workplace adjustment request while keeping it informal but still creating a solid paper trail?

Why Document Workplace Adjustment Requests at All?

First, let’s tackle the big picture: why bother documenting adjustment requests?

- **Compliance with law:** Under the Equality Act 2010, employers must consider reasonable adjustments for disabled workers—defined broadly to include any physical or mental impairment with a substantial, long-term effect on normal day-to-day activities.
- **Health and safety:** Stress is a recognised workplace hazard according to the Health and Safety Executive (HSE). Employers have a duty to manage work-related stress risks through regular risk assessments, known as HSE Stress Risk Assessments.
- **Evidence of communication:** An informal written record ensures you and your staff member have a shared understanding of their needs and agreements without escalating to formal procedures.
- **Protecting both parties:** In case problems arise later, keeping adjustments “in writing” safeguards everyone involved.

What Does 'Informal' Documentation Look Like?

“Informal” doesn’t mean “hand-waving” or leaving everything to vague memory. It means creating a clear, simple, and non-intimidating record. Examples include:

- A brief **informal email record** summarising a conversation
- A message sent over internal chat platforms, like WhatsApp or Telegram, but copied into email or saved centrally
- A direct message on social or communication apps — such as Instagram DM, Twitter/X messages, Facebook Messenger, Viber — where appropriate and readable
- A quick note after a call or meeting

But remember, if you use messaging apps or social media channels for this, make sure [reasonable adjustments for medication side effects](#) to archive or back up the discussion as part of your official records. For example, you can forward the messages to your work email or a shared folder. This creates a **paper trail** without shifting into stressful formality.

Quick Tips for Informal Documentation

- Always summarise agreed points in a follow-up email or message.
- Keep language clear and factual—avoid vague terms like “feeling better” or “trying to help.”
- Use timestamps or dates when possible.
- Avoid overly clinical or legal language that might intimidate your colleague.
- Respect privacy and confidentiality when using social media or messaging apps.

Stress as a Health and Safety Hazard

Work-related stress isn't just "in someone's head." It's a recognised health and safety concern under the **Health and Safety at Work etc. Act 1974**. The HSE Guidance clearly states that employers have a duty to assess and control risks related to work stress. This means adjustments might not just be "nice to have," they could be necessary to avoid a breach of duty.

HSE Stress Risk Assessments and Employer Duties

Employers should carry out stress risk assessments using the HSE Management Standards Approach. This breaks down stress risks into six key areas:

1. Demands
2. Control
3. Support
4. Relationships
5. Role
6. Change

If an employee's stress levels stem from one or more of these areas, appropriate adjustments must be considered as part of risk controls. Documenting the employee's request—even informally—helps show you've identified and responded to a workplace hazard.

Understanding Disability and the Equality Act

Many people assume "disability" means visible physical impairment, but under the **Equality Act 2010**, disability includes long-term mental health conditions or stress-related impairments if they affect day-to-day activities substantially and long-term.

This means that workers might be entitled to reasonable adjustments for mental health or stress. Employers must consider such requests seriously and keep records—even informal ones—of the consultation process and any agreed measures.

Examples of Reasonable Adjustments for Stress and Disability

- Flexible working hours
- Reduced workload or altered deadlines
- Regular check-ins or support meetings
- Quiet workspace or remote working options
- Temporary change of duties

Documenting these adjustments is vital to track what's provided and when it needs reviewing.

Creating Your Informal Email Record

Writing a short but useful email or message following a conversation is one of the best ways to keep things informal yet documented. Here's a simple checklist for what to include in your email or chat follow-up:

1. Greet the employee warmly and thank them for sharing their concerns.

2. Summarise the main points of their request or issue discussed.
3. List any adjustments the company is proposing or will explore further.
4. Note any next steps or follow-up meetings planned.
5. Encourage the employee to clarify or add anything that might have been missed.
6. Keep the tone supportive and non-judgmental.

Sample Informal Email Record

Subject: Follow-up on our chat about your working arrangements Hi [Name], Thanks for talking with me today about how we can support your work given your current challenges. To recap, you mentioned that the current workload feels too demanding at times, and we agreed to try adjusting your deadlines and allowing some remote work two days a week. Let's check in again in two weeks to see how this is working for you and make any further changes if needed. Please let me know if I've missed anything important or if you want to discuss anything else. Best, [Manager Name]

Using Social and Messaging Platforms to Support Documentation

It's increasingly common to communicate via mobile apps and social platforms, especially in small businesses without formal intranets or HR portals. The key is to use these platforms wisely:

Platform	Pros	Cons	Tips
WhatsApp	Immediate, common for quick chats	Message loss if chat is deleted, privacy concerns	Save important adjustment chats by forwarding to email or Telegram group
Facebook Messenger	Familiar, supports long chats and attachments	Mixes personal and work contact info	Use work-only accounts or suggest switching to email for formal notes
Instagram DM	Good for creative teams	Not searchable easily, often informal tone	Summarise conversations afterward in email
Twitter/X Direct Messages	Quick and easy for brief notes	Limited message length, not ideal for detailed discussions	Use for initial informal chats, then formalise in email
YouTube Comments	Not recommended	Public, no privacy	Avoid using for workplace conversations
Telegram	Secure, supports groups, easy to archive	Less common among some staff	Great for ongoing adjustment discussions if backed up
Viber	Similar to WhatsApp with encryption		Split usage across staff
Pinterest	Not suitable	Public and visual only	Do not use for adjustment records

Additional Ways to Create a Paper Trail Without Formality

Beyond email or chat, consider these options:

- **Shared folders:** Drop-in notes or summaries in a Google Drive or OneDrive folder accessible only to relevant managers.
- **Voice notes:** Record a brief voice memo after a chat, then transcribe key points into an email.
- **Calendar invites:** Send yourself a calendar entry summarising the adjustment agreement with the employee's permission.

These quick snapshots can help demonstrate you've acted fairly and responsively, which is key if any disputes arise later.



Don't Let “Informal” Become “Forgetful”

My biggest bugbear is when managers say, “Oh, I helped them, but I didn’t write anything down.” That’s exactly the sort of “hand-wavy wellbeing talk” that fails both the employee and the company. Stress and disability adjustments must be taken seriously, documented—even in simple, informal ways—and reviewed regularly.

To recap:



- Stress is a health and safety risk under the **Health and Safety at Work etc. Act 1974**, governed by HSE standards.
- The **Equality Act 2010** says reasonable adjustments must be considered for disabilities, including mental health.
- Document adjustment requests through informal emails, chat messages, or other communication tools—saved or forwarded into formal archives.
- Always summarise and confirm conversations in writing, however casual the channel.

- Use appropriate platforms mindfully—apps like WhatsApp, Telegram, and Facebook Messenger can work if you keep records.

Want a Handy Checklist?

1. Hold a supportive chat about adjustments needed.
2. Write a brief, clear follow-up email or message summarising agreements.
3. Store this message in a shared folder or forward to your official email.
4. Schedule review dates for adjustments with the employee.
5. Revisit and update the record as needed.

This approach keeps things informal and personal, but still creates a solid paper trail that satisfies legal duties and keeps everyone safe and supported.

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You can easily share these tips with your team or fellow managers on your favourite platforms:

- WhatsApp Share Link
- Facebook
- Instagram (via Story or DM)
- Twitter/X
- YouTube (share link in comments or description)
- Telegram
- Viber
- Pinterest

Remember: Keeping adjustments approachable, informal, and properly written down protects your people, your business, and your peace of mind.