



HR Manager's Workplace Assessment Checklist

A practical guide to identifying support needs, reasonable adjustments and next steps at work

What this guide helps you do

Identify when a workplace assessment may be needed, ask the right questions, choose the most appropriate assessment route, and plan practical next steps after recommendations are made.

AptoLink supports organisations with practical workplace assessments and workplace adjustment support.

HR Manager's Workplace Assessment Checklist

When an employee is struggling at work, it can be difficult to know whether the issue is related to performance, health, confidence, workplace setup, equipment, communication, or unmet support needs.

This checklist is designed to help HR managers and line managers take a practical, structured approach before requesting a workplace assessment or workplace needs assessment.

It can help you identify when support may be needed, what questions to ask, which type of assessment may be appropriate, and what should happen after recommendations are made.

1. When Should HR Consider a Workplace Assessment?

A workplace assessment may be useful when:

- An employee says they are struggling with part of their role.
- A manager notices a change in confidence, comfort, output, attendance or communication.
- An employee discloses a disability, health condition, neurodivergence, sight loss, hearing impairment, mobility issue or mental health difficulty.
- Someone is returning to work after absence, illness or injury.
- An employee is experiencing pain, fatigue or discomfort at work.
- Screen-based work, software, reading, typing or digital systems are creating barriers.
- A DSE or workstation issue may be affecting comfort or productivity.
- Existing adjustments are no longer working.
- Occupational health has recommended adjustments, but HR needs help putting them into practice.
- A manager is unsure whether the issue is performance-related or support-related.

Key reminder

What first appears to be a performance issue may sometimes be an unmet workplace need. Before moving straight to performance management, it is worth asking whether the employee has the right tools, equipment, training, environment and support to do their job.

2. Initial Questions for HR or Managers to Ask

Use these questions to guide an early, supportive conversation with the employee.

Understanding the situation

- Which parts of your role feel most difficult at the moment?
- When did you first start noticing these difficulties?
- Are there particular tasks, systems, meetings or environments that create barriers?
- Are the challenges constant, or do they vary depending on the day, task or setting?
- Are there parts of your role that still feel manageable or work well?

Understanding workplace barriers

- Is your workstation comfortable and suitable?
- Are your screen, chair, desk, keyboard, mouse and equipment working well for you?
- Are you able to access the software, documents and systems you need?
- Do you find reading, typing, listening, speaking, concentrating or remembering information difficult at work?
- Do noise, lighting, interruptions or the working environment affect you?
- Are meetings, phone calls, video calls or written instructions accessible and manageable?

Understanding existing support

- Have you used any adjustments, equipment or strategies in the past?
- Is anything currently helping?
- Is anything currently making work harder?
- Have any adjustments stopped working or become less effective?
- Would training, equipment, software, changes to communication, or changes to routine help?

Asking about next steps

- Would you be comfortable with a workplace assessment to explore practical support?
- Are there any immediate changes that may help while we arrange further advice?
- Is there anything you would prefer us not to share with your manager or wider team?
- How would you like us to involve your line manager in this process?

3. Which Type of Workplace Assessment Might Be Needed?

Different situations call for different types of assessment. This table can help HR decide which route may be appropriate.

Situation	Possible assessment route
Employee is uncomfortable at their desk or screen setup	DSE or workstation assessment
Employee has pain, fatigue, posture issues or physical discomfort	Ergonomic assessment
Employee is struggling with software, reading, typing, digital access or communication	Assistive technology assessment
Employee has dyslexia, ADHD, autism, dyspraxia or another neurodivergent profile	Neurodiversity workplace assessment or workplace needs assessment
Employee has sight loss or visual impairment	Visual impairment workplace assessment
Employee has hearing impairment or communication barriers	Hearing impairment workplace assessment
Employee is returning after absence, illness or injury	Return-to-work assessment and/or occupational health input
Employee has disclosed a health condition affecting work	Occupational health assessment and/or workplace needs assessment
Occupational health has recommended adjustments but practical implementation is unclear	Workplace needs assessment or practical adjustment support
Employee may need government support or funding for adjustments	Access to Work guidance or assessment
Manager is unsure whether the issue is performance or support-related	Workplace needs assessment

Important distinction

A workplace needs assessment is usually practical and task-focused. It looks at barriers, equipment, systems, communication, environment and adjustments. An occupational health assessment is usually more medically focused. It helps employers understand how health may affect work, absence, safety or return-to-work planning. In many situations, HR may need both.

4. Workplace Assessment Checklist for HR

Use this checklist before arranging an assessment.

Employee needs and role

- Have we spoken with the employee about what they are finding difficult?
- Have we focused on workplace barriers rather than assumptions?
- Do we understand the employee's day-to-day tasks?
- Do we understand which parts of the role are most affected?
- Have we considered whether the issue may relate to equipment, environment, software, communication, workload or training?

Workstation and equipment

- Has the employee's workstation been reviewed?
- Are their screen, chair, desk, keyboard and mouse suitable?
- Are there signs of discomfort, pain, fatigue or poor posture?
- Does the employee work from home, on site, or across multiple locations?
- Does their setup support their actual working pattern?

Software and accessibility

- Can the employee access the systems and documents they need?
- Are digital documents, forms and platforms accessible?
- Would built-in accessibility settings help?
- Is specialist software needed?
- Would the employee need training to use any new or existing tools effectively?

Communication and management

- Are instructions clear and accessible?
- Are deadlines, priorities and expectations clearly communicated?
- Would written summaries, structured check-ins or clearer task lists help?
- Does the manager need guidance on supporting the employee?
- Are meetings, calls and video calls accessible?

Reasonable adjustments and support

- Have reasonable adjustments been considered?
- Have short-term and long-term adjustments been discussed?
- Have we documented what has been agreed?
- Have we identified who is responsible for each action?
- Have we set a date to review whether the support is working?

5. What Happens in a Workplace Needs Assessment?

A workplace needs assessment usually follows a practical process.

Step 1: Understand the reason for the assessment

The assessor will look at why the assessment has been requested and what HR, the manager or employee needs to understand.

Step 2: Review the employee's role

The assessor will explore the employee's tasks, working environment, equipment, systems, communication demands and working pattern.

Step 3: Identify barriers

The employee will be able to explain what is difficult, what is already working, and where support may be needed.

Step 4: Recommend practical adjustments

Recommendations may include equipment, assistive technology, training, changes to communication, changes to working patterns, environmental adjustments or manager guidance.

Step 5: Agree next steps

The assessment should lead to clear actions. HR, the manager and employee should understand what needs to happen next, who is responsible, and when the support will be reviewed.

6. What Adjustments Might Be Recommended?

Every employee and workplace is different, but recommendations may include:

Equipment

- Ergonomic chair
- Footrest
- Monitor arm
- Larger screen
- Alternative keyboard or mouse
- Document holder
- Improved lighting
- Equipment for home or hybrid working

Software and assistive technology

- Built-in accessibility settings
- Screen magnification
- Screen-reading software
- Speech-to-text software
- Text-to-speech software
- Mind-mapping tools
- Planning and organisation software
- Note-taking tools

Working patterns and environment

- Adjusted start or finish times
- Planned breaks
- Quieter workspace
- Reduced distractions
- Changes to lighting or noise
- Hybrid working adjustments
- Phased return-to-work arrangements

Communication and management support

- Clearer written instructions
- Meeting summaries
- Structured check-ins
- Prioritised task lists
- More notice of changes
- Manager guidance
- Awareness training for relevant teams

Training and follow-up

- Assistive technology training
- Software training

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- Employee confidence-building support
- Manager coaching
- Review meetings
- Adjustment effectiveness checks

The best adjustments are not always the most expensive ones. Sometimes a small change to communication, training, workflow or environment can make a significant difference.

The key is that adjustments should be understood, implemented and reviewed. Equipment alone will not solve a problem if the employee has not been trained to use it or the manager does not understand how the adjustment should work in practice.

7. What Comes After a Workplace Assessment?

A workplace assessment is only useful if the recommendations are acted on.

After receiving an assessment report, HR should:

- Review the recommendations with the employee.
- Clarify any points that are unclear.
- Decide what can be implemented quickly.
- Identify which adjustments are reasonable and practical.
- Agree who is responsible for each action.
- Source equipment, software or specialist support.
- Arrange training where needed.
- Brief the line manager where appropriate.
- Document agreed adjustments.
- Set a review date.
- Check whether the adjustments are working in practice.

Follow-up questions to ask

- Has the adjustment helped?
- Is the employee able to use any new equipment or software confidently?
- Does the manager understand how to support the adjustment?
- Are there any new or remaining barriers?
- Is further training or guidance needed?
- Should the adjustment be changed, extended or reviewed again?

8. Common Mistakes to Avoid

Assuming the issue is performance-related too early

If an employee is struggling, first consider whether workplace barriers, equipment, software, communication, workload or health-related needs may be involved.

Focusing only on diagnosis

A diagnosis can be helpful, but workplace assessments should focus on practical needs and barriers in the role.

Buying equipment without training

Assistive technology and specialist equipment may not help if the employee does not know how to use them effectively.

Treating the report as the end of the process

The assessment report is a starting point. The value comes from implementation, training and review.

Forgetting the manager

Line managers are often central to making adjustments work. They may need guidance, reassurance and practical support.

Failing to review adjustments

Workplace needs can change. Adjustments should be reviewed when the role, working pattern, equipment, health condition or workplace environment changes.

9. Quick HR Action Checklist

Use this final checklist when supporting an employee who may need workplace adjustments.

- Speak with the employee.
- Listen without making assumptions.
- Identify the main workplace barriers.
- Consider whether this may be a support need rather than a performance issue.
- Review workstation, equipment and software.
- Consider communication, workload and management support.
- Decide which type of assessment may be needed.
- Seek specialist input where appropriate.
- Agree practical next steps.
- Document actions and responsibilities.
- Arrange training if equipment or software is recommended.
- Set a review date.
- Check whether the support is working.

10. How AptoLink Can Help

AptoLink supports organisations with practical workplace assessments and workplace adjustment support.

We help HR teams, managers and occupational health professionals identify barriers and turn recommendations into practical action.

Our support may include:

- workplace needs assessments
- DSE and workstation support
- assistive technology advice
- support for employees with sight loss, hearing impairment, neurodivergence, mobility issues or mental health challenges
- practical recommendations for reasonable adjustments
- equipment and software guidance
- employee training
- manager guidance
- follow-up support to check that adjustments are working

AptoLink is not an occupational health provider. Instead, we help organisations bridge the gap between recommendations and practical workplace support.

If you are unsure which assessment is right for an employee, or you need help implementing workplace adjustments, AptoLink can support you.

Contact AptoLink

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