

The manager's mental health quick checklist



Use this 5-step framework before and during sensitive conversations. This isn't about fixing mental health — it's about noticing early, responding with care, and following fair process.

1 Notice the change

Ask yourself:

- Has their behaviour shifted suddenly (quieter, defensive, withdrawn)?
- Are they “present” but not performing (presenteeism)?
- Is there a pattern - or is this new?

Tip: Write down one specific example to keep your conversation factual.

2 Ask, don't assume

Starter questions:

- “I've noticed you seem a little different this week - how are things?”
- “Is anything at work making things harder right now?”
- “What support would help you most?”

Tip: Keep it simple and genuine. You're opening a door, not diagnosing.

3 Record support offered

Log what you've done:

- Signposting to EAP, counselling, MHFA.
- Referrals to Occupational Health (OH).
- Adjustments offered (e.g. workload, flexible hours).

Tip: Where appropriate, keep a confidential record of agreed support and follow-up actions in line with your organisation's HR and data-protection policies.

4 Balance care and team needs

Ask yourself:

- Am I supporting the individual and ensuring the rest of the team feels safe and supported also?
- Is anyone else being negatively affected (workload, conflict, morale)?

Tip: Boundaries matter - don't promise what you can't deliver. Keep empathy + fairness in balance.

5 Stick to process

Check yourself:

- Am I following company policy (absence, conduct, performance)?
- Have I logged key actions?
- Am I avoiding “special deals” outside procedure?

Tip: Policies and procedures aren't red tape - they're your safety net. They protect both people and the business.

Next Steps

- Remember, you don't need to have all the answers
- you just need to notice, act, and follow through.
- Log 1:1s and follow-ups in your HR Platform
- Keep conversations and actions easy to revisit.

Useful links for managers:

- HSE Stress Risk Assessment Tool
<https://www.hse.gov.uk/stress/risk-assessment.htm>
- Acas - Supporting Mental Health at Work
<https://www.acas.org.uk/supporting-mental-health-workplace>
- Mind UK - For Employers
<https://www.mind.org.uk/workplace/my-mental-health-at-work/>

A commitment to supporting **mental health** across the mortgage and property finance industry.



MORTGAGE INDUSTRY
Mental Health Charter

If you are concerned that someone may be at immediate risk of harm, follow your organisation's emergency or safeguarding procedures and seek appropriate professional support.



To become a signatory of the Mortgage Industry Mental Health Charter please complete the online form at www.mimhc.co.uk.