



Supporting
Employee
Success 

A tool to plan accommodations
for workplace mental health

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Background

In June 2013, a forum of Occupational Health Professionals discussed workplace mental health and the challenges around accommodation of employees with mental illness or other mental health issues. The forum was supported by the Great-West Life Centre for Mental Health in the Workplace. The group concluded that there is a need for a more effective process that healthcare professionals, employees and employers can use when an employee may be in need of an accommodation. The outcome was the development of *Supporting Employee Success*, a tool that provides a step-by-step process to:

- Assess work-related triggers for emotional or cognitive issues
- Develop accommodations that may best support employee success
- Facilitate the employee's well-being
- Help maintain a safe and productive workplace

Supporting Employee Success:

- ✓ ***Can be used on its own, or as part of an existing approach, to support an employee's accommodation needs***
- ✓ ***Helps to explore the psychological, emotional and cognitive Job Expectations and develop strategies that support the employee's success on the job***

Many opinions exist about what constitutes the best approach to ensure a successful accommodation. The areas covered in this process were developed from a review of related literature and input from the occupational health community and others.

What you need to know

It's important to note that not all Job Expectations named in the process may be applicable to your accommodation situation. To reduce the amount of time required to complete the process, the employer can disregard those expectations that they feel are not of concern. There may also be other expectations not mentioned that you may wish to add to the process.

The ideas that support success are specifically for psychological, emotional and cognitive concerns and do not cover other physical accommodation needs, such as side-effects from medication.

The ideas shared are intended to be no-cost or low-cost to implement, except for a small investment of time and/or a change in communication approach.

For the overall process to be successful, a few basic tenets must exist. If they do not, the process may not be helpful, and could even make the situation worse.

The three basic tenets necessary for success are:

1. The workplace is committed to accommodating the employee through an ongoing collaborative process.
2. The employee wants to stay at work/return to work and will strive to do the job with accommodations that are reasonable and acceptable to both the employee and the employer.
3. The Job Expectations and the needs of the employee, with regard to accomplishing the requirements of the job, are clearly understood.

Using Supporting Employee Success

This process is recommended for developing:

1. An accommodation plan for an employee who remains at work.
2. Accommodation plan for an employee who is returning to work.
3. An additional process to a plan that focuses on physical function.

If your workplace uses disability providers or external consultants, you can share this *Supporting Employee Success* tool with them to address the psychological, emotional and cognitive Job Expectations.

Supporting Employee Success is not a medical process

This entire process focuses on workplace function and issues, and should not include medical information. The process must, at all times, respect medical confidentiality. Medical confidentiality means that the healthcare professional should not provide any information about the employee's medical diagnosis unless the employee specifically requests in writing (i.e. provides full written consent) that the information be provided to the employer as part of this process. The conversation should focus on *abilities and ideas that may support success on the job*, rather than on diagnosis or symptoms.

What Job Expectations does *Supporting Employee Success* include?

- 1. Adaptability and flexibility** - The ability to work effectively in the midst of change or rigid constraints. Adapts to changing needs, conditions and work responsibilities.
- 2. Attention to detail** - The ability to perform work tasks that require attention to detail or concentration on detailed information.
- 3. Decision making** - The ability to work effectively when analyzing problems, organizing information, resolving issues or generating solutions.
- 4. Degree of self-supervision** - The ability to work effectively without supervision.
- 5. Degree of supervisor responsibility** - The ability to work effectively in the role of supervisor, respecting organizational values and policies while meeting objectives.
- 6. Exposure to confrontational situations** - The ability to work effectively when confronted by an individual or when encountering confrontational situations requiring the employee to take action. The confrontation may be in person or over the telephone. The employee may be encountering an individual whose behaviour is argumentative, verbally or physically aggressive or abusive, insistent, hostile, loud, threatening or disruptive.
- 7. Exposure to distractions** - The ability to work effectively in the presence of visual, auditory or other distractions.
- 8. Exposure to emotionally stressful situations** - The ability to work effectively in emotionally stressful situations or when exposed to emotionally distressed individuals in person, over the telephone, or via other communication channels such as Twitter, Facebook, etc.
- 9. Overlapping tasks** - The ability to perform and/or monitor more than one task or function at a time, and to judge when tasks or functions require attention. It involves the ability to prioritize tasks and manage time effectively.
- 10. Problem solving and analysis** - The ability to work effectively at solving problems and analysing situations and information.
- 11. Recall** - The ability to recall and retrieve, on demand, information that has been previously learned.
- 12. Time pressures** - The ability to complete tasks within a given time period, the ability to work quickly when required, and/or the ability to manage time effectively so that all tasks are completed on time and at an acceptable level of quality.
- 13. Working relationships** - The ability to work well with others in co-operation and collaboration. This may include team projects, shared job duties, and social interactions with management and co-workers.
- 14. Other** - Blank template to add other Job Expectations not found above.

When should the process be introduced?

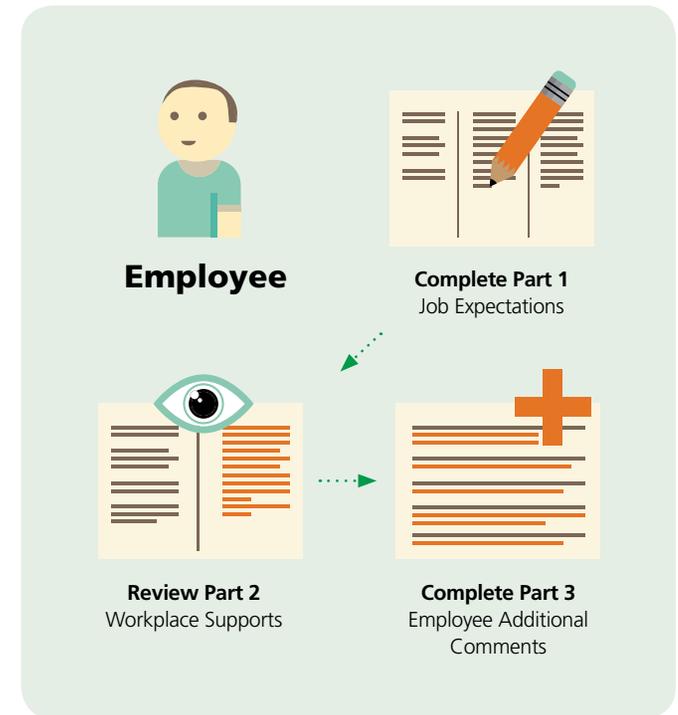
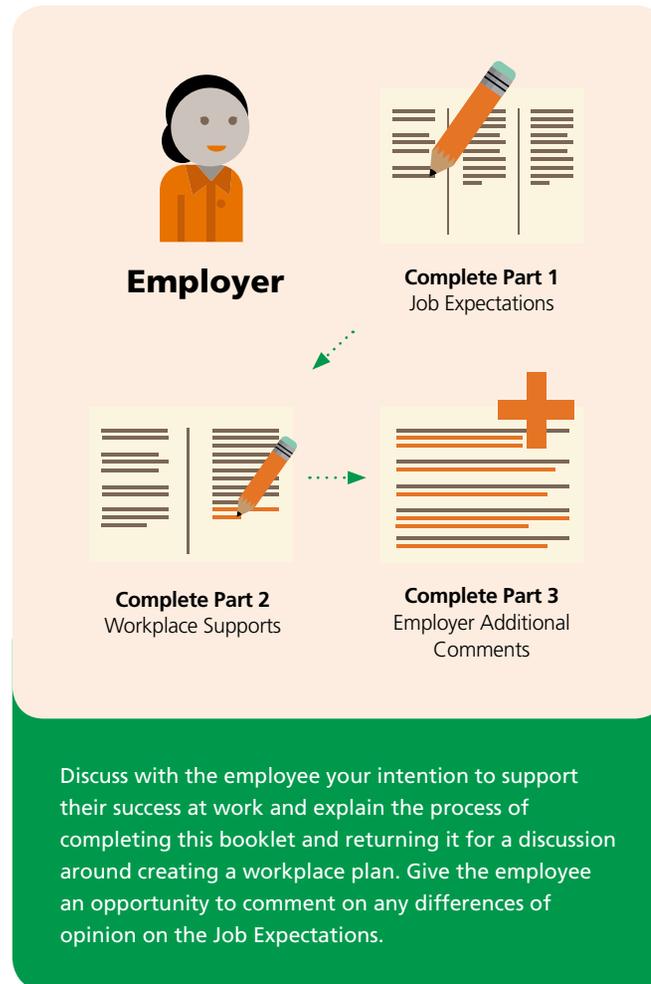
It is ideal that the process is introduced to all employees, and worker representatives (union reps) where applicable, in advance of the need to use it. For example, at orientation of new employees and/or as general information to all employees. This helps reduce stigma or concern about the process at the time of an accommodation.

How does the process work?

In the following example, the employer initiates the process. Please refer to back of this booklet for a more detailed breakdown.

This process can be initiated by:

- The employer (HR, occupational health, management) where an employee may require an accommodation.
- The employee who is seeking accommodation.
- A worker or union representative.
- A healthcare professional supporting a patient to stay at or return to work.
- A disability management professional or vocational rehab consultant.





Healthcare Professional or another trusted advisor



Complete Part 1 with employee
Job Expectations



Review Part 2
Workplace Supports



Review Part 3
Additional Comments



Complete Part 4
Supporting Success Conversation

Give the booklet and your invoice to the employee to pass back to the employer. Alternatively, you may decide to send a copy of the booklet with your invoice directly to the employer.



Employee and Employer



Employee returns completed booklet to employer
after discussion with the healthcare professional.



Employer reviews input from employee
and healthcare professional.



Employer meets with the employee to
discuss the completed booklet, and to
create a plan to support success.

Part 1

Job Expectation #1 – Adaptability and flexibility

Ability to work effectively in the midst of change or rigid constraints. Adapts to changing needs, conditions and work responsibilities.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> No need for flexibility required, work follows a structured routine. <input type="checkbox"/> Occasional need for flexibility required, most work demands follow a structured routine. <input type="checkbox"/> Frequent need for flexibility required to respond to changing work demands, few work demands follow a structured routine. <input type="checkbox"/> Constant flexibility required to respond to changing work demands, work does not follow a structured routine to manage the volume of work. 		<ul style="list-style-type: none"> <input type="checkbox"/> I work best in a structured, routine work environment. <input type="checkbox"/> I can occasionally adapt to changes in my work routine but prefer a structured approach. <input type="checkbox"/> I find it challenging to stick to a rigid routine and prefer some flexibility. <input type="checkbox"/> I prefer to have a great deal of flexibility in terms of how I meet my work demands. 		<ul style="list-style-type: none"> <input type="checkbox"/> The flexibility around hours of work that would be helpful is: And the reason for this is: <input type="checkbox"/> The flexibility that would be helpful around deadlines would be: <input type="checkbox"/> The flexibility around the time of day that tasks are completed that would be helpful is: And the reason for that is: <input type="checkbox"/> The approach to flexibility can support the job getting done in the following ways: 	

Job Expectation #2 – Attention to detail

The ability to perform work tasks that require attention to detail or concentration on detailed information.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> Attention to detail or concentration is not required. <input type="checkbox"/> Attention to detail or concentration is required for some tasks, although not at an intense level. <input type="checkbox"/> Significant attention to detail or concentration required for many tasks or intense attention to detail or concentration required for some tasks. <input type="checkbox"/> Intense attention to detail or concentration is required for the majority of job tasks. 		<ul style="list-style-type: none"> <input type="checkbox"/> I have difficulty when required to concentrate on, or attend to, details. <input type="checkbox"/> I am able to concentrate on, or attend to, details for some tasks, although not at an intense level. <input type="checkbox"/> I am able to concentrate on, or attend to, details at a significant level for many tasks or at an intense level for some tasks. <input type="checkbox"/> I am able to concentrate on, or attend to, details at an intense level. 		<ul style="list-style-type: none"> <input type="checkbox"/> Request the removal of any non-essential functions of the job which include: <input type="checkbox"/> Request to break large tasks into a series of smaller tasks. <input type="checkbox"/> Request more time to attend to work requiring attention to detail, specifically: <input type="checkbox"/> Request permission for short breaks when concentration declines. (Even standing up for 10 seconds can improve concentration). <input type="checkbox"/> Request instructions and assignments in writing. <input type="checkbox"/> Create a checklist that includes each step of a task to be completed as quality control. <input type="checkbox"/> Exchange tasks with other employees that maintain the balance of work while capitalizing on the strengths of each employee (e.g., if this employee performs well doing client contact, the employee takes on another employee's client contact tasks in exchange for tasks that are detail-oriented, such as policy work). The specific tasks that could be exchanged include: 	

Job Expectation #3 – Decision making

The ability to work effectively when analyzing problems, organizing information, resolving issues or generating solutions.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> Errors in judgement or attention would have insignificant consequences. <input type="checkbox"/> Errors in judgement or attention would create inconvenience. <input type="checkbox"/> Errors in judgement or attention could create serious difficulty or significant expense. <input type="checkbox"/> Errors in judgement or attention could have grave or life-threatening consequences. 		<ul style="list-style-type: none"> <input type="checkbox"/> Making decisions where a level of judgement is critical could be uncomfortable. I prefer not to have to make judgement decisions. <input type="checkbox"/> Making a decision where a level of judgement is critical may require assistance. <input type="checkbox"/> Making a decision where a level of judgement is critical is within my current capability. <input type="checkbox"/> Making a decision where a level of judgement is critical is never a problem for me. 		<ul style="list-style-type: none"> <input type="checkbox"/> Identify the areas where an error in judgement could create difficulty, including: <input type="checkbox"/> Create checklists to guide judgement in routine tasks such as: <input type="checkbox"/> Request more time to attend to work requiring attention to detail, specifically: <input type="checkbox"/> Develop a list of areas where decisions should be discussed such as: <input type="checkbox"/> Identify areas where judgements must be discussed. 	

Job Expectation #4 – Degree of self-supervision

The ability to work effectively without supervision.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> Supervisor on site at all times required. <input type="checkbox"/> Occasional self-supervision required (supervisor frequently provides direction). <input type="checkbox"/> Frequent self-supervision required (supervisor occasionally provides direction). <input type="checkbox"/> Predominantly self-supervised throughout the shift (may contact supervisor to obtain direction as needed). 		<ul style="list-style-type: none"> <input type="checkbox"/> I prefer to have a supervisor on site at all times. <input type="checkbox"/> If I am clear about what I am required to do, I am able to self-supervise at times. <input type="checkbox"/> If I am clear about what I am required to do, I am comfortable with supervising myself. <input type="checkbox"/> I am able to supervise myself effectively to meet or exceed all Job Expectations. 		<ul style="list-style-type: none"> <input type="checkbox"/> Create detailed task lists and timeline. <input type="checkbox"/> Provide frequent check in opportunities. <input type="checkbox"/> Set priorities and direction for dealing with conflict among priorities. <input type="checkbox"/> Develop outcome measurements by task, day, week and month. <input type="checkbox"/> Provide a list of alternate supervisors to contact when necessary. 	

Job Expectation #5 – Degree of supervisor responsibility

The ability to work effectively in the role of supervisor, respecting organizational values and policies while meeting objectives.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> Has very limited supervisory responsibility. <input type="checkbox"/> Provides work direction only with no other supervisory duties. <input type="checkbox"/> Provides work direction and some elements of managing work performance with the exclusion of disciplinary action. <input type="checkbox"/> Has full supervisory responsibility for other employees. 		<ul style="list-style-type: none"> <input type="checkbox"/> I am currently unable to fulfill my supervisory responsibilities. <input type="checkbox"/> I currently feel challenged in terms of effectively supervising others. <input type="checkbox"/> I may need assistance from time to time in effectively carrying out my supervisory duties. <input type="checkbox"/> I am fully capable to carry out my supervisory duties in a manner that aligns with organizational values and policies. 		<ul style="list-style-type: none"> <input type="checkbox"/> Develop a list of specific behaviours that can assist in effective supervision of others. <input type="checkbox"/> Explore supervisory behaviours that may be interpreted by others as problematic such as: <input type="checkbox"/> Develop strategies to deal with stress in the workplace. <input type="checkbox"/> Identify a mentor to call about challenging situations. <input type="checkbox"/> Identify particularly challenging work relationships and brainstorm alternative responses to these individuals. <input type="checkbox"/> Reduce or remove supervisory responsibilities in the following ways: 	

Job Expectation #6 – Exposure to confrontational situations

Ability to work effectively when confronted by an individual or encountering confrontational situations requiring the employee to take action. The confrontation may be in person or over the telephone. The employee may be encountering an individual whose behaviour is argumentative, verbally or physically aggressive or abusive, insistent, hostile, loud, threatening or disruptive.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> No exposure to confrontational situations in the normal course of duties. <input type="checkbox"/> Occasional exposure (up to weekly) to confrontational situations in which assistance for the employee is immediately available. <input type="checkbox"/> Occasional exposure to confrontational situations (up to weekly) where assistance for the employee is not immediately available. <input type="checkbox"/> Frequent exposure (up to daily) to confrontational situations or hostile people where assistance may or may not be available. 		<ul style="list-style-type: none"> <input type="checkbox"/> I am unable to work effectively in confrontational situations. <input type="checkbox"/> I am able to tolerate occasional exposure (up to weekly) to confrontational situations where assistance is immediately available to me. <input type="checkbox"/> I am able to effectively manage occasional exposure (up to weekly) to confrontational situations where assistance may not be immediately available to me. <input type="checkbox"/> I am able to effectively manage frequent exposure (approx. daily) to confrontational situations, even when assistance may not be available. 		<ul style="list-style-type: none"> <input type="checkbox"/> Review policies and practices related to confrontational situations in the workplace with the employee. <input type="checkbox"/> Educate employees on potential confrontational situations and recommended responses. <input type="checkbox"/> Consider simulation training on confrontational situations that employees are exposed to. <input type="checkbox"/> Consider how to provide or increase support for the employee in situations that are potentially confrontational. <input type="checkbox"/> Exchange tasks with other employees that maintain the balance of work while capitalizing on the strengths of each employee (e.g., if this employee performs well doing administrative tasks, the employee could temporarily take on another employee's administration tasks in exchange for tasks that may involve confrontational situations. Help ensure that this approach will not result in resentment or hostility of co-employees by considering potential solutions that also support good working relationships). <input type="checkbox"/> Allow more frequent breaks (e.g., three 5-minute breaks rather than one 15-minute break). 	

Job Expectation #7 – Exposure to distractions

The ability to work effectively in the presence of visual, auditory or other distractions. Auditory distractions may include conversations between colleagues in an open office area, phones ringing, alarms sounding, motors running, and noises that are loud, constant, sudden or unpredictable. Visual distractions may include lighting, the movement of people, vehicles or objects. Other distractions may include heat, cold, strong odors from perfumes, chemicals or food.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> Little or no visual, auditory or other distractions. <input type="checkbox"/> Minor degree of distractions present during some tasks or portions of the shift. <input type="checkbox"/> Moderate degree of distractions during some tasks or portions of the shift. <input type="checkbox"/> High degree of distractions are present for the majority of the shift or for any portion of the shift where it is essential to work effectively despite distractions (e.g. very noisy, busy environment with multiple stimuli). 		<ul style="list-style-type: none"> <input type="checkbox"/> I have difficulty working effectively with distractions, specifically: <input type="checkbox"/> I am able to work effectively with a minor degree of distractions, such as: <input type="checkbox"/> I am able to work effectively with a moderate degree of distractions, including: <input type="checkbox"/> I am able to work effectively with a high degree of distractions, including: 		<ul style="list-style-type: none"> <input type="checkbox"/> Request a quieter work space with fewer distractions, specifically: <input type="checkbox"/> Request permission to use headphones to listen to calming sounds or music. <input type="checkbox"/> Request permission to wear earplugs to reduce noise distraction. <input type="checkbox"/> Request exposure to natural lighting in the work area. This could be special lighting or a window. <input type="checkbox"/> Request permission to reduce clutter in the work area. <input type="checkbox"/> Minimize use of scents if this has been identified as a medical issue. <input type="checkbox"/> Request modifications that reduce exposure to specific stimuli including: <input type="checkbox"/> Allow for some or all of the work to be done at home, if practical. 	

Job Expectation #8 – Exposure to emotionally stressful situations (See Job Expectation #6 for confrontational situations)

Ability to work effectively in emotionally stressful situations or when exposed to emotionally distressed individuals in person, over the telephone, or via other communication channels such as Twitter, Facebook, etc.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> No exposure to emotionally stressful circumstances or emotionally distressed individuals in the normal course of duties. <input type="checkbox"/> Infrequent exposure (approx. monthly) to emotionally stressful circumstances or emotionally distressed individuals with whom the employee must interact in order to complete job requirements. <input type="checkbox"/> Occasional exposure (approx. weekly) to emotionally stressful circumstances or emotionally distressed individuals with whom the employee must interact in order to complete job requirements. <input type="checkbox"/> Frequent exposure (approx. daily) to emotionally stressful circumstances or emotionally distressed individuals with whom the employee must interact to complete job requirements. 		<ul style="list-style-type: none"> <input type="checkbox"/> I am unable to work effectively in emotionally stressful circumstances or with individuals who are experiencing emotional distress. <input type="checkbox"/> I am able to tolerate infrequent exposure (e.g., monthly) to emotionally stressful circumstances or individuals who are experiencing emotional distress. <input type="checkbox"/> I am able to tolerate occasional exposure (e.g., weekly) to emotionally stressful circumstances or individuals who are experiencing emotional distress. <input type="checkbox"/> I am able to tolerate frequent exposure (e.g., daily) to emotionally stressful circumstances or individuals who are experiencing emotional distress. 		<ul style="list-style-type: none"> <input type="checkbox"/> The best way to provide instructions and feedback to me in emotionally stressful situations at work is: <input type="checkbox"/> The best way for me to personally cope in emotionally stressful situations at work is: <input type="checkbox"/> Consider how to provide or increase support in situations that are emotionally stressful, specifically: <input type="checkbox"/> Provide genuine praise and positive reinforcement during the work week. <input type="checkbox"/> Allow reasonable time off to attend counselling sessions or medical appointments, specifically: <input type="checkbox"/> Allow reasonable phone calls (up to 15 minutes per day, and preferably during break time) to access necessary emotional support during the workday. <input type="checkbox"/> Provide supportive employment services or a work coach. <input type="checkbox"/> Allow more frequent breaks (e.g., three 5-minute breaks rather than one 15-minute break). 	

Job Expectation #9 – Overlapping tasks

The ability to perform and/or monitor more than one task or function at a time, and to judge when tasks or functions require attention. It includes the ability to prioritize tasks and manage time effectively.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> Not responsible for concurrent multiple tasks, only responsible for performing one task at a time until completion or further direction of supervisor. <input type="checkbox"/> Some responsibility for multiple tasks, but very clear guidelines or cues about when to perform each task. <input type="checkbox"/> Responsible for multiple tasks, with some time management skill and judgement required to determine priorities. <input type="checkbox"/> Constantly responsible for multiple concurrent tasks and/or functions and must exercise a high degree of judgement to determine when to attend to each task. 		<ul style="list-style-type: none"> <input type="checkbox"/> I have difficulty performing more than one task at a time. <input type="checkbox"/> I am able to perform more than one task, but may require cues or guidelines to indicate which tasks are a priority. <input type="checkbox"/> I am able to perform a moderate number of multiple tasks requiring time management skill and judgment to determine and make decisions about priorities. <input type="checkbox"/> I am able to perform a high number of multiple tasks requiring time management skill and judgment to determine and make decisions about priorities. 		<ul style="list-style-type: none"> <input type="checkbox"/> Request modifications to workplace processes to focus on one task at a time, if practical. <input type="checkbox"/> Outline clear, specific and measurable expectations with all tasks. <input type="checkbox"/> Develop a list of all tasks and review with supervisor to help establish priorities. <input type="checkbox"/> Provide opportunities to improve efficiency on specific tasks, including: <ul style="list-style-type: none"> <input type="checkbox"/> Request training on time management skills. <input type="checkbox"/> Consider job-sharing arrangements. <input type="checkbox"/> Request the removal of any non-essential functions of the job, including: <input type="checkbox"/> Create a schedule that indicates the amount of time spent on required tasks each week and review against the actual time spent. 	

Job Expectation #10 – Problem solving and analysis

The ability to work effectively at solving problems and analysing situations and information.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> No analytical thinking or problem solving required in the normal course of duties. <input type="checkbox"/> Analysis of information needed to solve problems that have limited to minimal level of difficulty (e.g. may involve selection of pre-defined alternatives according to standard practice). <input type="checkbox"/> Analysis of information needed to solve problems that have moderate to significant level of difficulty (e.g. the full extent of issues may not be readily apparent and requires investigation and research). <input type="checkbox"/> Analysis of information needed to solve problems that have extensive to strategic issues (e.g. issues may require independent judgement, substantial investigation or are highly complex). 		<ul style="list-style-type: none"> <input type="checkbox"/> My work does not require analytical thinking or problem solving. <input type="checkbox"/> I am able to analyze information and solve routine problems on the job. <input type="checkbox"/> I am able to analyze information and solve challenging problems on the job. <input type="checkbox"/> I am able to analyze information and enjoy solving complex problems on the job. 		<ul style="list-style-type: none"> <input type="checkbox"/> Create a decision tree template to assist with problem solving or analytical thinking in relation to the following: <input type="checkbox"/> Set up a list of situations that would indicate the need to reach out for assistance in analysis or problem solving including example given safety issue: <input type="checkbox"/> Have regular check ins during the decision making process. 	

Job Expectation #11 – Recall

The ability to recall and retrieve, on demand, information that has been previously learned.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> Basic memory skills are needed to recall information that is applied to routine work tasks. <input type="checkbox"/> Basic recall skills are required to apply to routine work tasks that may vary from day to day in complexity and frequency. <input type="checkbox"/> Moderate recall ability is required for time sensitive and more complex information or tasks. <input type="checkbox"/> High recall ability is required to deal with complex tasks and/or processes which also have expectations of accuracy, confidentiality, compliance and/or firm deadlines. 		<ul style="list-style-type: none"> <input type="checkbox"/> I may have difficulty recalling information and applying it to work tasks. <input type="checkbox"/> I am able to recall routine information related to work tasks that may vary from day to day in complexity and frequency. <input type="checkbox"/> I am able to recall complex information in time sensitive situations. <input type="checkbox"/> I have strong recall ability to deal with complex tasks and/or processes which also have expectations of accuracy, confidentiality, compliance and/or firm deadlines. 		<ul style="list-style-type: none"> <input type="checkbox"/> With permission, use recording devices (e.g., smartphone or digital recorder) to provide playback of information discussed at meetings. <input type="checkbox"/> Use digital organizers or handwritten notes as ongoing to-do lists, marking off items as they are completed. <input type="checkbox"/> Request that instructions and assignments are in writing to help provide clarity and improve recall. <input type="checkbox"/> Set up regular reminders of upcoming milestones, appointments or deadlines. <input type="checkbox"/> Arrange regular meetings between supervisor and employee to set priorities and keep work on track. <input type="checkbox"/> Provide retraining and/or re-orientation related to the following tasks: <input type="checkbox"/> Individualized training approaches such as increased learning time, reading materials in advance, or applied learning to help improve comprehension and retention. 	

Job Expectation #12 – Time pressures

The ability to complete tasks within a given time period, the ability to work quickly when required, and/or the ability to manage time effectively so that all tasks are completed on time and at an acceptable level of quality.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> Employee is not exposed to time pressures because the work is self-paced, without rigid time constraints. <input type="checkbox"/> Time pressure is low: there is occasional pressure to meet deadlines or work within time constraints, the volume of work and the work pace are moderate. <input type="checkbox"/> Time pressure is moderate: there is frequent pressure to meet deadlines or work within time constraints and/or the volume of work is high and the work pace is moderately fast. <input type="checkbox"/> Time pressure is high: majority of work is performed under rigid time constraints and the volume of work is high (assumes that the work pace is high or the employee often extends the workday to manage the volume of work). 		<ul style="list-style-type: none"> <input type="checkbox"/> Maintaining quality while keeping up with the pace of work can sometimes be difficult for me. <input type="checkbox"/> Meeting deadlines and/or dealing with pressure to perform while maintaining quality of work can be difficult. <input type="checkbox"/> I am able to do quality work at a moderately fast pace and can usually perform well under time pressures. <input type="checkbox"/> I am able to produce high quality work while under pressure and am comfortable when faced with a high volume and fast pace of work. 		<ul style="list-style-type: none"> <input type="checkbox"/> Review assigned tasks to establish a reasonable amount of time required for completion. Ensure that all parts of the process are included. Specifically look at the following tasks: <input type="checkbox"/> Develop a process that establishes and monitors weekly timelines for the completion of assigned tasks. <input type="checkbox"/> Establish regular times to check in with the manager or supervisor throughout more complex tasks or projects. <input type="checkbox"/> Clearly define priorities. <input type="checkbox"/> Where possible, avoid assigning tight deadlines or provide sufficient resources to effectively meet that deadline. <input type="checkbox"/> Facilitate clear communication and collaboration to ensure timely completion of each team member's responsibility within a project. <input type="checkbox"/> In times of pressure, the best way to give me feedback would be: 	

Job Expectation #13 – Working relationships

The ability to work well with others in co-operation and collaboration. This may include team projects, shared job duties, and social interactions with management and co-workers.

Employer requirements to fulfil Job Expectations (check one)	Employer comments on how the expectations can impact the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and healthcare professional Check any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success
<ul style="list-style-type: none"> <input type="checkbox"/> Not required to work closely with others to perform job tasks, other than to receive direction from supervisor; does not work in physical proximity to co-employees so social interaction is minimal. <input type="checkbox"/> Infrequently required to work in co-operation with others to complete job tasks, works in physical proximity to others. <input type="checkbox"/> Required to regularly work in co-operation and within physical proximity with others. <input type="checkbox"/> The job position requires co-operation and close collaboration with others. 		<ul style="list-style-type: none"> <input type="checkbox"/> I work best when working alone and sometimes find it challenging to work with others. <input type="checkbox"/> I can work co-operatively and collaboratively with others but prefer to work on my own. <input type="checkbox"/> On most tasks and in most situations I work co-operatively and collaboratively with others. <input type="checkbox"/> On all tasks and in all situations I work co-operatively and collaboratively with others. 		<ul style="list-style-type: none"> <input type="checkbox"/> Define requirements and limitations for an acceptable working relationship and how employees will be held accountable for this type of behaviour. <input type="checkbox"/> Outline clear and measurable expectations for respect in the workplace for all employees <input type="checkbox"/> Define how success will be measured (i.e., no critical comments in team meetings, no outbursts, etc.). <input type="checkbox"/> Provide all staff with training on building a socially supportive workplace. <input type="checkbox"/> Provide training for managers and supervisors to increase their capacity to model effective communication in the workplace. <input type="checkbox"/> Develop processes and strategies to deal effectively with conflict. <input type="checkbox"/> Provide open and honest feedback in the following ways: <input type="checkbox"/> Allow the option of not attending work-related social functions. <input type="checkbox"/> Consider resources that can help develop the ability to engage more effectively with others in the workplace. Some ideas can include: 	

Job Expectation #14 – Other

Add your own new job expectation in this blank template.

Employer requirements to fulfil Job Expectations	Employer comments on how the expectations can impact the job	Employee assessment of current abilities	Employee comments on how their current ability might impact their job	Employee and healthcare professional List any ideas that you would like the employer to consider	Healthcare professional comments on recommendations to support employee success

Part 2

Workplace Supports (to be completed by the employer)

Organizational supports and initiatives that address the psychological health and safety of all employees.

Organizational Initiatives and Supports	Remarks
<ul style="list-style-type: none"><input type="checkbox"/> Information and resources about health and safety are available from areas such as occupational health and/or human resources <input type="checkbox"/> Organization has an active wellness committee that provides ongoing information, education and support to employees about topics related to health and well-being <input type="checkbox"/> Organization strategically builds manager and supervisor competencies around communication skills and emotional intelligence <input type="checkbox"/> Employee Assistance Program (EAP) or Employee and Family Assistance Program (EFAP) available to employee <input type="checkbox"/> 24–7 access to support services through the EAP or EFAP <input type="checkbox"/> Peer support program available in the workplace <input type="checkbox"/> Organization has implemented the requirements of the National Standard of Canada for Psychological Health and Safety in the Workplace <input type="checkbox"/> Other resources <p><i>Please attach a detailed job description.</i></p>	

Part 3

Additional Comments

Employer Additional Comments

Please add information to clarify additional expectations and prioritize the areas where you would like some suggestions that will allow you to support the employee's success. Additional Job Expectations or comments:

List the areas where you would like suggestions from the healthcare professional to support a successful return to work. Please prioritize to indicate the top two or three items.

- 1. _____
- 2. _____
- 3. _____

Employee Additional Comments

Additional Job Expectations not previously mentioned by employer:

List the areas that you would like some assistance with to achieve a successful return to work. Please prioritize so that you indicate the top two or three items.

- 1. _____
- 2. _____
- 3. _____

Part 4

Supporting Success Conversation

This page is intended as a guide for a discussion with the employee on workplace strategies. It helps support exploration of possible solutions and accommodations. **It can be used by anyone the employee feels comfortable with, including a healthcare professional or another trusted advisor, manager, human resources professional, occupational health professional or union representative.**

The following questions are offered to help guide the discussion and are based on the premise that the relevant Job Expectations have been completed and the employee is ready to return to or is staying at work.

The ultimate goal is to contribute to a plan that supports the employee to do his or her job while maintaining well-being.

Question:	Response:
1. What will allow you to be successful at your job and still have energy at the end of the day?	
2. What can you do to successfully manage your return to work and maintain your well-being?	
3. What can your workplace/supervisor do to support a successful and sustainable return to work for you?	
4. Are there current tasks that you would like additional training/re-training on?	
5. How can feedback be provided to you in a positive and constructive way?	
6. How should future issues be managed in a way that is positive and healthy for you?	

Based on the conversation, please include any other potential concerns or comments.

Responding to questions about absence from work:

Many employees are concerned or curious about colleagues who have been away from work. This interest can lead to questions about the absence when the employee returns to work. There are many ways to respond – for example:

- *Thanks very much for asking. I am pleased to be back at work and am feeling much better.*
- *I had a few health challenges and am now recovering but prefer not to go into specific details.*
- *Despite my recent health challenges, I feel well enough to be back at work – even if I need a few accommodations.*
- *I am happy to be back as my work, and the folks I know here, are very important to me.*
- *Thanks very much for asking (and, if you are comfortable with a broader discussion) – despite my bout with “name of illness.”, I am now recovering and understand my illness much better.*

Preparing to respond can lessen the discomfort and help improve working relationships. Below write what you might prefer to say:

You also may wish to have your employer speak to co-workers about your absence and/or return to work. If so, write down what you would like shared:

Healthcare Professional Name: _____

Employee Initials: _____

Sample letter to the healthcare professional

Here's an example of a template you can use to write a letter to a healthcare professional.

(Employer's name) is interested in helping ensure that our employees are able to have a successful return-to-work experience.

To help in achieving a successful return to work, we need your assessment of your patient's capabilities.

With the focus on capabilities, rather than on limitations, we can achieve reasonable accommodation. This knowledge will allow us to identify and manage potential gaps in perspective between the employee's understanding and the workplace's expectations.

Our employee, (insert name), will meet in consultation with you to determine those job aspects that may affect (his or her) health.

(Insert name) will give you a booklet that provides information in Parts 1 to 3 describing the Job Expectations and current workplace realities. (Insert name) may have already completed (his or her) part, or may complete this with you.

We ask you to fill in the last two columns of Part 1 along with Part 4 – Supporting Success Conversation - while in discussion with (insert name). Together, these documents will provide us with valuable, nonmedical information that can help us develop a workplace plan.

As a result of this consultation, we will use your recommendations to help the employee to successfully return to work.

(Employer's name) recognizes that this is a time-consuming request and will pay you (insert amount) for review and completion of the forms. Please send your invoice for this amount to: (insert name).

Thank you in advance for your help with enhancing (insert employee's name) return-to-work experience.

Example process in more detail

In the following example, the employer initiates the process.

Employer

Complete the employer section of **Part 1 - Job Expectations** using the instructions provided:

- Choose the Job Expectations that are relevant and fill them out.
- Check the level of expectation that is required for each.
- Complete the comments section on how the expectations can impact the job.

Complete **Part 2 - Workplace Supports** and add a job description.

Complete **Part 3 - Employer Additional Comments** and identify the top two or three items as priorities.

If applicable, complete a letter to the healthcare professional (see *Sample letter* on previous page).



Employee

Review the information that the employer has provided. If you prefer, take this to your healthcare professional or other trusted advisor to review and complete together.

Complete the employee section of **Part 1 - Job Expectations** using the instructions provided:

- Check the level for each Job Expectation that most accurately describes your current ability.
- Review the employer expectations and make comments in the employee column about how current abilities can impact Job Expectations.

- Complete the comments section on how your current ability might impact your job.

Review **Part 2 - Workplace Supports** and add remarks if you need more information about any of these resources.

Complete **Part 3 - Employee Additional Comments** and identify the top two or three items as priorities.



Healthcare Professional or another trusted advisor

Complete **Part 1 - Job Expectations with the employee.**

Discuss ideas that you would like the employer to consider, and complete the comments on recommendations to support success.

Discuss any ideas that you would like the employer to consider, and complete the comments on recommendations to support success.

Review **Part 2 - Workplace Supports** and other resources available to the employee.

Review **Part 3 - Additional Comments.**

Complete **Part 4 - Supporting Success Conversation**, in discussion with the employee.



Give the booklet and your invoice to the employee to pass back to the employer. Alternatively, you may decide to send a copy of the booklet with your invoice directly to the employer.

Employee and Employer

The employee returns the completed booklet to the employer after discussion with the healthcare professional.

The employer reviews input from the employee and the healthcare professional.

The employer arranges to meet with the employee to discuss the completed booklet, and to create a comprehensive workplace plan to support success.





Supporting Employee Success



**A tool to plan accommodations
for workplace mental health**



**This resource is available for free download from
www.workplacestrategiesformentalhealth.com**