



Supporting  
**Employee**  
Success 

**A tool to help employees  
be successful at work**

# Supporting Employee Success

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## Background

A forum of occupational health professionals met to discuss workplace well-being and the challenges around accommodation of employees. The group concluded that there is a need for a more effective process that employees, employers, healthcare professionals and others can use when an employee may be in need of an accommodation or support. The outcome was the development of *Supporting Employee Success*, a tool that provides a step-by-step process to:

- Assess stressors related to psychological, emotional, cognitive, and physical issues at work
- Develop strategies that may best support employee success
- Help maintain a safe and productive workplace

### **Supporting Employee Success:**

- ✓ *Can help inform the development of an effective workplace plan between the employer and employee*
- ✓ *Can be used on its own, or as part of an existing approach, to support an employee's accommodation needs*

### **What you need to know**

It's important to note that not all of the job expectations named in the process may be applicable to your workplace situation. The employer can disregard those expectations they feel are not of concern or relevant to them. There may also be other expectations not mentioned that the employer or employee may wish to add to the process.

In the job expectations section, we have included ideas to support an employee at work that are generally no cost or low cost to implement, except for an investment of time and/or a change in communication approach.

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

### **The three basic factors necessary for success are:**

1. The workplace is committed to supporting employee success through an ongoing collaborative process.
2. The employee wants to stay at work/return to work and will strive to do the job with necessary supports 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 to assist in developing ideas and strategies to support:

1. A workplace plan for an employee *who remains at work*
2. A workplace plan for an employee *who is returning to work*

If your workplace uses disability providers or external consultants, you can also share *Supporting Employee Success* with them.

*Many opinions exist about what constitutes the best approach to ensure a successful accommodation of a disability. The areas covered in this process were developed from a review of related literature and input from the occupational health community and others. Where the suggested solutions do not provide the necessary support to allow the employee to do their job successfully, consultation with an expert (for example, an ergonomist or occupational therapist) is recommended.*

## What job expectations are included?

(See individual job expectations for full descriptions)

1. **Adaptability and flexibility** – The ability to work effectively in the midst of changing needs, conditions and work responsibilities.
2. **Attention to detail** – The ability to perform work tasks that require significant attention or understanding.
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, including working remotely or when a supervisor is not available.
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.
7. **Exposure to distractions** – The ability to work effectively in the presence of visual, auditory or other distractions.
8. **Tolerance of stressful environments** – The ability to work effectively in a stressful environment, which may be caused by workplace processes or physical hazards such as noise, lighting, scents, chemicals and others.

### **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 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 strategies that may support success on the job**, rather than on diagnosis or symptoms.

9. **Exposure to distressed people** – The ability to work effectively when exposed to emotionally distressed individuals in person or over the phone or other communication channels such as social media.
10. **Overlapping tasks** – The ability to perform and/or monitor more than one task or function at a time, and identify when tasks or functions require attention.
11. **Problem solving and analysis** – The ability to work effectively at solving problems and analyzing situations and information.
12. **Recall** – The ability to recall and retrieve, on demand, information that has been previously learned.

13. **Time pressures** – The ability to complete tasks within a given time period, work quickly when required, and/or manage time effectively so that all tasks are completed on time and at an acceptable level of quality.
14. **Working relationships** – The ability to work well, collaborate, and cooperate with all stakeholders, including management, co-workers, or clients.
15. **Physical demands** – The ability to safely and effectively meet the physical demands of the job.
16. **Work endurance** – The ability to effectively perform work tasks for a long period of time with little opportunity for breaks due to the nature of the work being performed. This also includes the ability to work regular, rotating, overnight or on-call shifts.
17. **Degree of isolation** – The ability to work effectively without regular contact with others. This could include interacting primarily through technology or infrequently, if ever, coming together face-to-face.
18. **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 – such as union reps – where applicable, in advance of the need to use it. For example, share it 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 need.

## How does the process work?

In the following detailed example, the employer initiates the process.



**Employer**

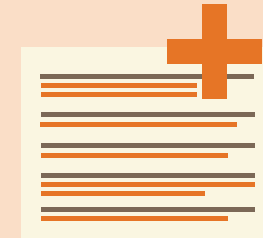


Complete the employer section of **Part 1 – Job expectations** using the instructions provided:

- Choose the relevant job expectations and fill them out.
- Check the level of expectation required for each.
- Complete the comments section on why this level of the expectation is important to the job.
- Review and cross out any ideas in the second last (blue) column that are not possible or practical.
- You may also add any ideas not shown. This helps the employee focus on what solutions may actually be available.

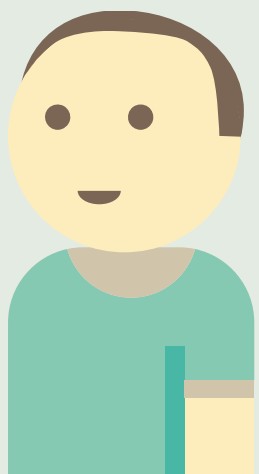


Complete **Part 2 – Workplace supports** and add a detailed job description as noted.



Complete **Part 3 – Employer additional comments** by identifying the top two or three priorities for each comment.

If applicable, complete a letter to the healthcare professional (See *sample letter* on page 48).



## Employee

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

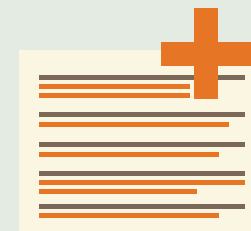


Complete the employee section of **Part 1 – Job expectations** using the instructions provided:

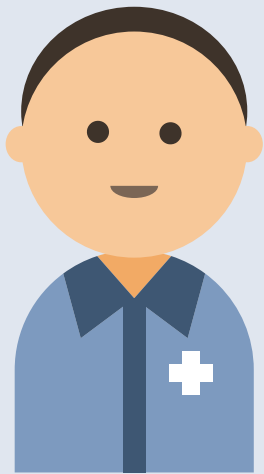
- **Employee assessment of current abilities** – check the level for each job expectation that most accurately describes your current ability.
- **Employee comments on how their current ability might impact their job** – review the employer expectations and complete the comments section on how your current ability might impact your job.



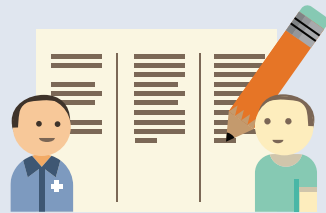
Review **Part 2 – Workplace supports** and add remarks if you need more information about any of these resources.



Complete **Part 3 – Employee additional comments** and identify the top two or three priorities for each comment.



## Trusted advisor

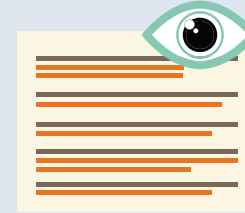


### To be completed with employee:

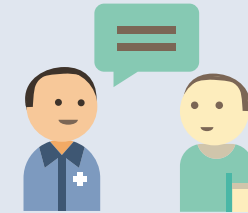
Complete **Part 1 – Job expectations** and discuss any ideas you would like the employer to consider and complete **the trusted advisor comments on recommendations to support employee success.**



Review **Part 2 – Workplace supports** and other resources the employer is making available to the employee.



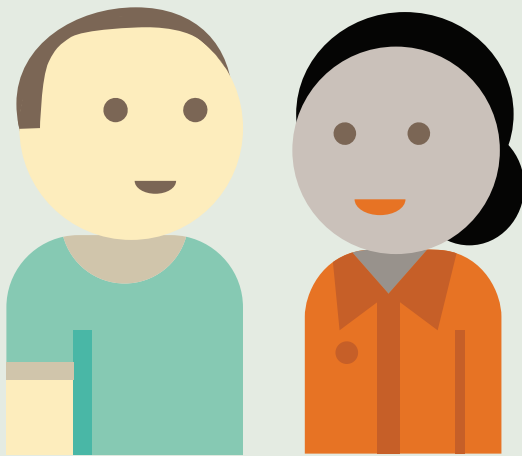
Review **Part 3 – Additional comments** and comment if necessary on the priorities that have been identified.



Complete **Part 4 – Supporting success conversation** with the employee.

The trusted advisor, such as a human resources or an occupational health professional, social worker, psychologist, or union representative should provide their comments in the booklet and, where appropriate, their invoice, to the employee to pass back to the employer. In some cases, the trusted advisor may decide to send a copy of the booklet with their invoice directly to the employer.

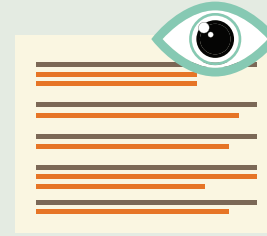




## Employee and employer



The employee returns the completed booklet to the employer after discussion with the trusted advisor.



The employer reviews input from the employee and the trusted advisor.



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

## Part 1

### Job expectation #1 – adaptability and flexibility

The ability to work effectively in the midst of changing needs, conditions and work responsibilities

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> Very little need for adaptability required; work follows a structured routine.</li> <li><input type="radio"/> Occasional need for adaptability required; most work demands follow a structured routine.</li> <li><input type="radio"/> Frequent need for adaptability required to respond to changing work demands; few work demands follow a structured routine.</li> <li><input type="radio"/> Constant adaptability required to respond to changing work demands; work does not follow a structured routine to manage the volume of work.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe that working in an environment where adaptability and flexibility is required could currently present a significant challenge for me.</li> <li><input type="radio"/> I can occasionally adapt to changes in my work routine but prefer a structured approach.</li> <li><input type="radio"/> I have no problem adapting to changing work demands.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> The flexibility around hours of work that would be helpful is:  And the reason for this is:</li> <li><input type="checkbox"/> The flexibility that would be helpful around deadlines would be:</li> <li><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:</li> </ul>	

## Job expectation #1 – adaptability and flexibility (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>				<p><input type="checkbox"/> The flexibility around the need for travel for work that would be helpful is:</p> <p>And the reason for that is:</p> <p><input type="checkbox"/> Providing flexibility can support the job getting done in the following ways:</p> <p><input type="checkbox"/> I would benefit if routine and structure can be provided in the following ways:</p>	

## Job expectation #2 – attention to detail

The ability to perform work tasks that require significant attention or understanding. This may include working to precise standards, literacy skills (reading) or numeracy skills (math) or remaining attentive doing repetitive work.

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> Significant attention to detail, concentration and understanding is not required.</li> <li><input type="radio"/> Significant attention to detail, concentration and understanding is required for some job tasks.</li> <li><input type="radio"/> Significant attention to detail, concentration and understanding is required for many job tasks.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe having to concentrate on, or attend to, details at a high level for the majority of job tasks will currently present a significant challenge for me.</li> <li><input type="radio"/> I am able to concentrate on, or attend to, details at a significant level for some job tasks.</li> <li><input type="radio"/> I am able to concentrate on, or attend to, details at a significant level for many job tasks.</li> <li><input type="radio"/> I am able to concentrate on, or attend to, details at a significant level for the majority of job tasks.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Training to improve understanding of essential job expectations</li> <li><input type="checkbox"/> Regular rotation of tasks/shift assignments</li> <li><input type="checkbox"/> Removal of any non-essential functions of the job, which include:</li> <li><input type="checkbox"/> Break large tasks into a series of smaller tasks</li> <li><input type="checkbox"/> More time to attend to work requiring attention to detail, specifically:</li> <li><input type="checkbox"/> Permission for short breaks when concentration declines – even standing for 10 seconds can improve concentration</li> </ul>	

## Job expectation #2 – attention to detail (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe having to understand details for the majority of job tasks will currently present a significant challenge for me.</li> <li><input type="radio"/> I am able to understand details for some tasks, although not at a significant level.</li> <li><input type="radio"/> I am able to understand details at a significant level for many tasks.</li> <li><input type="radio"/> I am able to understand details at a significant level for the majority of job tasks.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Provide instructions and assignments in writing</li> <li><input type="checkbox"/> Create a checklist that includes each step of a task to be completed as quality control</li> <li><input type="checkbox"/> Exchange tasks with other employees that maintain the balance of work while capitalizing on the strengths of each employee. Ensure this approach will not result in resentment of co-workers by considering potential solutions that also support good working relationships. Specific tasks to exchange could include:</li> </ul>	

## 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 why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> Errors in judgment or attention would have insignificant consequences.</li> <li><input type="radio"/> Errors in judgment or attention would create inconvenience.</li> <li><input type="radio"/> Errors in judgment or attention could create serious difficulty or significant expense.</li> <li><input type="radio"/> Errors in judgment or attention could have grave or life-threatening consequences.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe making decisions where a level of judgment is critical will currently present a significant challenge for me.</li> <li><input type="radio"/> Making a decision where a level of judgment is critical may require assistance.</li> <li><input type="radio"/> Making a decision where a level of judgment is critical is within my current capability.</li> <li><input type="radio"/> Making a decision where a level of judgment is critical is never a problem for me.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Identify the areas where an error in judgment could create difficulty, including:</li>   <li><input type="checkbox"/> Create checklists to guide judgement in routine tasks such as:</li> </ul>	

### Job expectation #3 – decision making (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>				<input type="checkbox"/> 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 judgments must be discussed	

## Job expectation #4 – degree of self-supervision

The ability to work effectively without supervision, including working remotely or when a supervisor is not available.

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> A supervisor is on site at all times to offer job support.</li> <li><input type="radio"/> Frequent self-supervision required (supervisor frequently provides direction).</li> <li><input type="radio"/> Occasional self-supervision is required (supervisor occasionally provides direction).</li> <li><input type="radio"/> Predominantly self-supervised throughout the shift (may contact supervisor to obtain direction as needed).</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe not having any supervision will currently present a significant challenge for me.</li> <li><input type="radio"/> If I am clear about what I am required to do, I am able to self-supervise at times.</li> <li><input type="radio"/> If I am clear about what I am required to do, I am comfortable with supervising myself.</li> <li><input type="radio"/> I am able to supervise myself effectively to meet or exceed all job expectations.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Create detailed task lists and timelines</li> <li><input type="checkbox"/> Provide frequent check-in opportunities</li> <li><input type="checkbox"/> Set priorities and direction for dealing with conflicting priorities</li> <li><input type="checkbox"/> Develop outcome measurements by task, day, week and month</li> <li><input type="checkbox"/> Provide a list of alternate supervisors to contact when necessary</li> </ul>	



## Job expectation #4 – degree of self-supervision (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>					

## 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 why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> Has very limited supervisory responsibility.</li> <li><input type="radio"/> Provides work direction only and has no other supervisory duties.</li> <li><input type="radio"/> Provides work direction and some elements of managing work performance with the exclusion of disciplinary action.</li> <li><input type="radio"/> Has full supervisory responsibility for other employees.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe fulfilling my supervisory responsibilities will currently present a significant challenge for me.</li> <li><input type="radio"/> I currently find it difficult to effectively supervise others.</li> <li><input type="radio"/> I may need assistance from time to time in effectively carrying out my supervisory duties.</li> <li><input type="radio"/> I am fully capable of carrying out my supervisory duties in a manner that aligns with organizational values and policies.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Develop a list of specific behaviours that can assist in effective supervision of others</li> <li><input type="checkbox"/> Explore supervisory behaviours that may be interpreted by others as problematic such as:</li> </ul>	

## Job expectation #5 – degree of supervisor responsibility (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
				<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 in these situations <input type="checkbox"/> Reduce or remove supervisory responsibilities in the following ways:	

Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.

## Job expectation #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, over the phone or over other communication channels such as social media. 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 why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> No exposure to confrontational situations in the normal course of duties.</li> <li><input type="radio"/> Occasional exposure (up to weekly) to confrontational situations in which assistance for the employee is immediately available.</li> <li><input type="radio"/> Occasional exposure to confrontational situations (up to weekly) where assistance for the employee is not immediately available.</li> <li><input type="radio"/> Frequent exposure (up to daily) to confrontational situations or hostile people where assistance may or may not be available.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe exposure to confrontational situations will currently present a significant challenge for me.</li> <li><input type="radio"/> I am able to tolerate occasional exposure (up to weekly) to confrontational situations where assistance is immediately available to me.</li> <li><input type="radio"/> I am able to effectively manage occasional exposure (up to weekly) to confrontational situations where assistance may not be immediately available to me.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Review policies and practices related to confrontational situations in the workplace with the employee</li> <li><input type="checkbox"/> Provide training on managing potentially confrontational situations and the recommended responses</li> <li><input type="checkbox"/> Consider how to provide or increase support for the employee in situations that are potentially confrontational</li> </ul>	

## Job expectation #6 – exposure to confrontational situations (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>		<p><input type="radio"/> I am able to effectively manage frequent, daily exposure to confrontational situations, even when assistance may not be available.</p>		<p><input type="checkbox"/> Exchange tasks with other employees that maintain the balance of work while capitalizing on the strengths of each employee. For example, if this employee performs well doing administrative tasks, they could temporarily take on another employee's administration tasks in exchange for tasks that may involve confrontational situations. Help ensure this approach will not result in resentment or hostility of co-workers by considering potential solutions that also support good working relationships.</p> <p><input type="checkbox"/> Allow more frequent breaks – for example, three 5-minute breaks rather than one 15-minute break</p>	

## 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 why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> Little or no visual, auditory or other distractions.</li> <li><input type="radio"/> Minor degree of distractions are present during some tasks or parts of the shift.</li> <li><input type="radio"/> Moderate degree of distractions during some tasks or parts of the shift.</li> <li><input type="radio"/> 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 – for example, very noisy, busy environment with multiple stimuli)</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe exposure to distractions will currently present a significant challenge for me.</li> <li><input type="radio"/> I am able to work effectively with a minor degree of distractions, including:</li>   <li><input type="radio"/> I am able to work effectively with a moderate degree of distractions, including:</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Request for a quieter work space with fewer distractions, specifically:</li>   <li><input type="checkbox"/> Permission to use headphones to listen to calming sounds or music</li> <li><input type="checkbox"/> Permission to wear earplugs to reduce noise distraction</li> <li><input type="checkbox"/> Exposure to natural lighting in the work area, such as special lighting or a window</li> </ul>	

## Job expectation #7 – exposure to distractions (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>		<input type="radio"/> I am able to work effectively with a high degree of distractions, including:		<input type="checkbox"/> 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"/> 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 – tolerance of stressful environments

The ability to work effectively in a stressful environment, which may be caused by workplace processes or physical hazards such as noise, lighting, scents, chemicals and others.

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> No exposure to stressful environments in the normal course of duties.</li> <li><input type="radio"/> Infrequent exposure (approx. monthly) to stressful environments to complete job requirements.</li> <li><input type="radio"/> Occasional exposure (approx. weekly) to stressful environments in order to complete job requirements.</li> <li><input type="radio"/> Frequent exposure (approx. daily) to stressful environments to complete job requirements.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe tolerating a stressful environment will currently present a significant challenge for me.</li> <li><input type="radio"/> I am able to tolerate infrequent exposure (approx. monthly) to stressful environments.</li> <li><input type="radio"/> I am able to tolerate occasional exposure (approx. weekly) to stressful environments.</li> <li><input type="radio"/> I am able to tolerate frequent exposure (approx. daily) to stressful environments.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> The best way to provide instructions and feedback to me in a stressful environment is:</li>   <li><input type="checkbox"/> The following supports would help me to cope in a stressful environment:</li>   <li><input type="checkbox"/> Consider how to provide or increase support in stressful situations, specifically:</li> </ul>	



## Job expectation #8 – tolerance of stressful environments (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>				<ul style="list-style-type: none"> <li><input type="checkbox"/> Provide genuine praise and positive reinforcement during the work week</li> <li><input type="checkbox"/> Allow reasonable time off to attend counselling sessions or medical appointments, specifically:</li> <li><input type="checkbox"/> Provide supportive employment services or a work coach</li> <li><input type="checkbox"/> Allow more frequent breaks – for example, three 5-minute breaks rather than one 15-minute break</li> <li><input type="checkbox"/> Regularly bring team together for team building activities that focus on building resilience, emotional intelligence, civility and respect</li> </ul>	

## Job expectation #9 – exposure to distressed people

The ability to work effectively when exposed to emotionally distressed individuals in person, over the phone or over other communication channels, such as social media.

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> Exposure to emotionally distressed individuals in the normal course of duties is rare.</li> <li><input type="radio"/> Infrequent exposure (approx. monthly) to emotionally distressed individuals with whom the employee must interact in order to complete job requirements.</li> <li><input type="radio"/> Occasional exposure (approx. weekly) to emotionally distressed individuals with whom the employee must interact in order to complete job requirements.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe exposure to distressed people will currently present a significant challenge for me.</li> <li><input type="radio"/> I am able to tolerate infrequent exposure (monthly) to individuals who are experiencing emotional distress.</li> <li><input type="radio"/> I am able to tolerate occasional exposure (weekly) to individuals who are experiencing emotional distress.</li> <li><input type="radio"/> I am able to tolerate frequent exposure (daily) to individuals who are experiencing emotional distress.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Provide training in emotional intelligence and/or other best practices</li> <li><input type="checkbox"/> Consider how to provide or increase support in emotionally stressful situations, specifically:</li>   <li><input type="checkbox"/> Provide genuine praise and positive reinforcement during the work week</li> </ul>	

## Job expectation #9 – exposure to distressed people (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p><input type="radio"/> Frequent exposure (approx. daily) to emotionally distressed individuals with whom the employee must interact to complete job requirements.</p>				<p><input type="checkbox"/> Allow reasonable time off to attend counselling sessions or medical appointments, specifically:</p> <p><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</p> <p><input type="checkbox"/> Provide supportive employment services or a work coach</p> <p><input type="checkbox"/> Allow more frequent breaks – for example three 5-minute breaks rather than one 15-minute break</p>	
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>					

## Job expectation #10 – overlapping tasks

The ability to perform and/or monitor more than one task or function at a time, and identify 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 why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> Not responsible for concurrent multiple tasks; only responsible for performing one task at a time until completion or further direction is provided by supervisor.</li> <li><input type="radio"/> Some responsibility for multiple tasks, but very clear guidelines or cues about when to perform each task.</li> <li><input type="radio"/> Responsible for multiple tasks, with some time management skill and judgment required to determine priorities.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe performing more than one task at a time will currently present a significant challenge for me.</li> <li><input type="radio"/> I am able to perform more than one task but may require guidance to determine which tasks are a priority.</li> <li><input type="radio"/> I am able to perform a moderate number of multiple tasks requiring time management skill and judgment to determine and make decisions about priorities.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Modifications to workplace processes to focus on one task at a time, if practical</li> <li><input type="checkbox"/> Outline clear, specific and measurable expectations with all tasks</li> <li><input type="checkbox"/> Develop a list of all tasks and review with supervisor to help establish priorities</li> <li><input type="checkbox"/> Request training on time management skills</li> <li><input type="checkbox"/> Consider job-sharing arrangements</li> <li><input type="checkbox"/> Request the removal of any non-essential functions of the job, including:</li> </ul>	

## Job expectation #10 – overlapping tasks (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p><input type="radio"/> Constantly responsible for multiple concurrent tasks and/or functions and must exercise a high degree of judgment to determine when to attend to each task.</p>		<p><input type="radio"/> I am able to perform a high number of multiple tasks requiring time management skill and judgment to determine and make decisions about priorities.</p>		<p><input type="checkbox"/> Provide opportunities to improve efficiency on specific tasks, including:</p> <p><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</p>	

Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.

## Job expectation #11 – problem solving and analysis

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

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> No analytical thinking or problem solving required in the normal course of duties.</li> <li><input type="radio"/> Analysis of information needed to solve problems that have limited to minimal level of difficulty – may involve selection of pre-defined alternatives according to standard practice.</li> <li><input type="radio"/> Analysis of information needed to solve problems that have moderate to significant level of difficulty – the full extent of issues may not be readily apparent and requires investigation and research.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe work requiring analysis or problem solving will currently present a significant challenge for me.</li> <li><input type="radio"/> I am able to analyze information and solve routine problems on the job.</li> <li><input type="radio"/> I am able to analyze information and solve challenging problems on the job.</li> <li><input type="radio"/> I am able to analyze information and enjoy solving complex problems on the job.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Create a decision tree template to assist with problem solving or analytical thinking in relation to the following:</li> </ul>	

## Job expectation #11 – problem solving and analysis (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p><input type="radio"/> Analysis of information needed to solve problems that have significant impact on strategic issues – for example, issues may require independent judgment, substantial investigation or are highly complex.</p>				<p><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 examples of safety issues:</p> <p><input type="checkbox"/> Have regular check-ins during the decision-making process</p>	

Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.

## Job expectation #12 – 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 why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> Basic recall skills are required for routine work tasks.</li> <li><input type="radio"/> Basic recall skills are required to apply to routine work tasks that may vary from day to day in complexity and frequency.</li> <li><input type="radio"/> Moderate recall ability is required for time-sensitive and more complex information or tasks.</li> <li><input type="radio"/> High recall ability is required to deal with complex tasks and/or processes that also have expectations of accuracy, confidentiality, compliance and/or firm deadlines.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe recalling information and applying it to work tasks will currently present a significant challenge for me.</li> <li><input type="radio"/> I am able to recall routine information related to work tasks that may vary from day to day in complexity and frequency.</li> <li><input type="radio"/> I am able to recall complex information in time sensitive situations.</li> <li><input type="radio"/> 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.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> With permission, use recording devices, such as smartphone or digital recorder, to provide playback of information discussed at meetings</li> <li><input type="checkbox"/> Use a digital organizer or handwritten notes as ongoing to-do lists, marking off items as they are completed</li> <li><input type="checkbox"/> Request instructions and assignments in writing to help provide clarity and improve recall</li> <li><input type="checkbox"/> Set up regular reminders of upcoming milestones, appointments or deadlines</li> </ul>	



## Job expectation #12 – recall (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>				<ul style="list-style-type: none"> <li><input type="checkbox"/> Arrange regular meetings between supervisor and employee to set priorities and keep work on track</li> <li><input type="checkbox"/> Provide retraining and/or re-orientation related to the following tasks:</li> <li><input type="checkbox"/> Consider individualized training approaches such as increased learning time, reading materials in advance or applied learning to help improve comprehension and retention</li> </ul>	

## Job expectation #13 – time pressures

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

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> Employee is not exposed to time pressures because the work is self-paced, without rigid time constraints.</li> <li><input type="radio"/> 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.</li> <li><input type="radio"/> 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.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe maintaining quality while keeping up with the pace of work will currently present a significant challenge for me.</li> <li><input type="radio"/> Meeting deadlines and/or dealing with pressure to perform while maintaining quality of work can be difficult.</li> <li><input type="radio"/> I am able to do quality work at a moderately fast pace and can usually perform well under time pressures.</li> <li><input type="radio"/> 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.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Review assigned tasks to establish a reasonable amount of time required for completion. Ensure all parts of the process are included. Specifically look at the following tasks:</li>   <li><input type="checkbox"/> Develop a process that establishes and monitors weekly timelines for the completion of assigned tasks</li> </ul>	

## Job expectation #13 – time pressures (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>○ Time pressure is high: most work is performed under rigid time constraints and the volume of work is high (assumes the work pace is high, or the employee often extends the workday to manage the volume of work).</p>				<ul style="list-style-type: none"> <li><input type="checkbox"/> Establish regular times to check in with the manager or supervisor throughout more complex tasks or projects</li> <li><input type="checkbox"/> Clearly define priorities</li> <li><input type="checkbox"/> Where possible, avoid assigning tight deadlines or provide sufficient resources to effectively meet that deadline</li> <li><input type="checkbox"/> Facilitate clear communication and collaboration to ensure timely completion of each team member's responsibilities within a project</li> <li><input type="checkbox"/> In times of pressure, the best way to give me feedback would be:</li> </ul>	
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>					

## Job expectation #14 – working relationships

The ability to work well, collaborate, and cooperate with all stakeholders, including management, co-workers, or clients. This may include team projects, shared job duties, client service, motivating others and social interactions.

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> Not required to work closely with others to perform job tasks, other than to receive direction from supervisor; does not work near co-workers so social interaction is minimal.</li> <li><input type="radio"/> Infrequently required to work in co-operation with others to complete job tasks, but works near others.</li> <li><input type="radio"/> Required to regularly work in co-operation with and near others.</li> <li><input type="radio"/> The job requires co-operation and close collaboration with others.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe functioning in a position of co-operation, collaboration or influence may currently present a significant challenge to me.</li> <li><input type="radio"/> I work best when working alone and sometimes find it challenging to work with others.</li> <li><input type="radio"/> I can work co-operatively and collaboratively with others but prefer to work on my own.</li> <li><input type="radio"/> On most tasks and in most situations, I work co-operatively and collaboratively with others.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Define requirements and limitations for an acceptable working relationship and how employees will be held accountable for this type of behaviour</li> <li><input type="checkbox"/> Outline clear and measurable expectations for respect in the workplace for all employees</li> <li><input type="checkbox"/> Define how success will be measured – for example, no critical comments in team meetings, no outbursts, adjusted sales targets</li> <li><input type="checkbox"/> Provide all staff with training on building a socially supportive workplace</li> </ul>	

## Job expectation #14 – working relationships (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>		<p><input type="radio"/> On all tasks and in all situations, I work co-operatively and collaboratively with others.</p>		<p><input type="checkbox"/> Provide training for managers and supervisors to increase their capacity to model effective communication in the workplace</p> <p><input type="checkbox"/> Develop processes and strategies to deal effectively with conflict</p> <p><input type="checkbox"/> Provide open and honest feedback in the following ways:</p> <p><input type="checkbox"/> Allow the option of not attending work-related social functions</p> <p><input type="checkbox"/> Consider resources that can help develop the ability to engage more effectively with others in the workplace. Some ideas can include:</p>	

## Job expectation #15 – physical demands

The ability to safely and effectively meet the physical demands of the job. This may include medium to heavy intensity of work using visual, auditory, upper or lower body mobility or strength, fine motor skill, or hand/eye coordination abilities.

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> No physical demands in the normal course of duties.</li> <li><input type="radio"/> Occasional exposure (up to weekly) to physically demanding work situations in which assistance is available immediately.</li> <li><input type="radio"/> Occasional exposure (up to weekly) to physically demanding work situations in which assistance is not available immediately.</li> <li><input type="radio"/> Frequent exposure (up to daily) to physically demanding work situations in which assistance may or may not be available.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe fulfilling the physical demands of the job will currently present a significant challenge for me.</li> <li><input type="radio"/> I am able to meet the physical demands of the job if the following physical limitations can be accommodated: (Please check and explain in detail in the column to the right.)               <ul style="list-style-type: none"> <li><input type="checkbox"/> Visual</li> <li><input type="checkbox"/> Auditory</li> <li><input type="checkbox"/> Upper body mobility or strength</li> <li><input type="checkbox"/> Lower body mobility or strength</li> <li><input type="checkbox"/> Fine motor skills</li> <li><input type="checkbox"/> Hand/eye coordination</li> <li><input type="checkbox"/> Other</li> </ul> </li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Consult with an ergonomist to ensure best practice</li> <li><input type="checkbox"/> Provide the following supports to accommodate physical limitations:</li> <li><input type="checkbox"/> Allow for short breaks to restore energy and focus – for example, 5 minutes every hour</li> </ul>	

## Job expectation #15 – physical demands (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>		<input type="radio"/> I am able to do all tasks to fulfill the usual physical demands of the job.		<input type="checkbox"/> Exchange tasks with other employees that maintain the balance of work while capitalizing on the strengths of each employee. It's important you ensure this approach will not result in resentment or hostility of co-workers by considering potential solutions that also support good working relationships.  <input type="checkbox"/> Provide appropriate workplace safety training that recognizes and supports the employee's physical abilities in the following areas:	

## Job expectation #16 – work endurance

The ability to effectively perform work tasks for a long period of time with little opportunity for breaks due to the nature of the work being performed. This also includes the ability to work regular, rotating, overnight or on-call shifts.

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Breaks</p> <ul style="list-style-type: none"> <li><input type="radio"/> Regular breaks are provided.</li> <li><input type="radio"/> Infrequently required to work long periods without breaks.</li> <li><input type="radio"/> Regularly required to work for longer periods without breaks.</li> <li><input type="radio"/> Frequently required to work for long periods without breaks.</li> </ul> <p>Shift work and overtime</p> <ul style="list-style-type: none"> <li><input type="radio"/> The job requires the ability to work regular, rotating shifts, without overtime.</li> <li><input type="radio"/> The job requires the ability to work regular, rotating day shifts, with overtime.</li> </ul>		<p>Breaks</p> <ul style="list-style-type: none"> <li><input type="radio"/> I believe working for longer periods without regular breaks will currently present a significant challenge for me.</li> <li><input type="radio"/> I am able to infrequently work longer periods without breaks.</li> <li><input type="radio"/> I am able to regularly work longer periods without breaks.</li> <li><input type="radio"/> I am able to frequently work longer periods without breaks.</li> </ul> <p>Shift work and overtime</p> <ul style="list-style-type: none"> <li><input type="radio"/> I believe working shift work, on-call shifts or overtime, will currently present a significant challenge for me.</li> </ul>		<p><input type="checkbox"/> Provide the following supports to help improve the employee’s endurance – for example, making drinking water and healthy snacks available at all times, and, if safe, allowing headphones for music:</p>	



## Job expectation #16 – work endurance (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<input type="checkbox"/> The job requires the ability to work regular, rotating shifts, on-call shifts and overtime if required.		<input type="radio"/> I am able to meet the usual expectations for the entire shift but will have some difficulty working overtime. <input type="radio"/> I am able to meet the usual expectations for the entire shift but will have some difficulty being called in unexpectedly. <input type="radio"/> I am able to meet the expectations for my entire shift without any difficulty, including overtime. <input type="radio"/> I am able to meet the expectations for my entire shift without any difficulty, including on-call shifts and overtime.		<input type="checkbox"/> Exchange tasks with other employees that maintain the balance of work while capitalizing on the strengths of each employee – for example, if an employee has regularly scheduled medical appointments, consider changing their work hours by switching their schedule with a co-worker. Help ensure 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"/> Not scheduling the employee for consecutive shifts where longer periods without breaks will be required	

## Job expectation #16 – work endurance (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
				<ul style="list-style-type: none"> <li><input type="checkbox"/> Not scheduling the employee for consecutive overtime shifts</li> <li><input type="checkbox"/> Balancing evening/overnight shifts with other shifts</li> <li><input type="checkbox"/> Removing the employee from the after-hours on-call list</li> <li><input type="checkbox"/> When possible, allowing for more frequent short breaks to restore energy and focus – for example, 5 minutes every hour</li> <li><input type="checkbox"/> Regularly check in with the employee during periods when breaks are not possible or during overtime shifts</li> </ul>	

## Job expectation #16 – work endurance (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>					

## Job expectation #17 – degree of isolation

The ability to work effectively without regular contact with others. This could include interacting primarily through technology or infrequently, if ever, coming together face-to-face.

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<ul style="list-style-type: none"> <li><input type="radio"/> No or rare interaction with supervisor or co-workers in the normal course of duties.</li> <li><input type="radio"/> Infrequent (approx. monthly) interaction with supervisor or co-workers to complete job requirements.</li> <li><input type="radio"/> Occasional (approx. weekly) interaction with supervisor or co-workers to complete job requirements.</li> <li><input type="radio"/> Frequent exposure (approx. daily) with supervisor or co-workers to complete job requirements.</li> </ul>		<ul style="list-style-type: none"> <li><input type="radio"/> I believe frequent interaction with my supervisor or co-workers will currently present a significant challenge for me.</li> <li><input type="radio"/> I work best with infrequent interaction with my supervisor or co-workers.</li> <li><input type="radio"/> I work best with occasional interaction with my supervisor or co-workers.</li> <li><input type="radio"/> I work best with frequent interaction with my supervisor or co-workers.</li> </ul>		<ul style="list-style-type: none"> <li><input type="checkbox"/> Provide the opportunity to interact with other team members via online technology more frequently than in the past. The reason for this is:</li> <li><input type="checkbox"/> Conduct regular team-building activities with work groups, either through online webinars or live meetings: <ul style="list-style-type: none"> <li><input type="checkbox"/> Annually</li> <li><input type="checkbox"/> Monthly</li> <li><input type="checkbox"/> Weekly</li> </ul> </li> <li><input type="checkbox"/> Bring remote team members together in a single location for meetings/events: <ul style="list-style-type: none"> <li><input type="checkbox"/> Annually</li> <li><input type="checkbox"/> Monthly</li> <li><input type="checkbox"/> Weekly</li> </ul> </li> </ul>	

## Job expectation #17 – degree of isolation (continued)

Employer requirements to fulfil job expectations (check one)	Employer comments on why this level of the expectation is important to the job	Employee assessment of current abilities (check one)	Employee comments on how their current ability might impact their job	Employee and trusted advisor Check any ideas that you would like the employer to consider	Trusted advisor comments on recommendations to support employee success
<p>Remember to cross out any ideas in the second last (blue) column that are not possible or practical. You may also add any ideas not shown. This helps the employee to focus on what solutions may actually be available.</p>				<ul style="list-style-type: none"> <li><input type="checkbox"/> Provide regular positive feedback acknowledging contributions and value</li> <li><input type="checkbox"/> As a perk or bonus, provide memberships that would allow more social interaction related to work and/or well-being, including:</li> <li><input type="checkbox"/> Allow regular time in the work-week to attend business, volunteer and/ or social functions that provide social interaction such as networking and well-being. These might include:</li> </ul>	

**Job expectation #18 – other**

Add your own new job expectation in this blank template.

<b>Employer requirements to fulfil job expectations (check one)</b>	<b>Employer comments on why this level of the expectation is important to the job</b>	<b>Employee assessment of current abilities (check one)</b>	<b>Employee comments on how their current ability might impact their job</b>	<b>Employee and trusted advisor</b> Check any ideas that you would like the employer to consider	<b>Trusted advisor comments on recommendations to support employee success</b>

## 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"><li><input type="checkbox"/> Information and resources about health and safety are available from areas such as occupational health and/or human resources</li><li><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</li><li><input type="checkbox"/> Employee skills are refreshed regularly through ongoing training</li><li><input type="checkbox"/> Organization strategically builds manager and supervisor competencies around communication skills and emotional intelligence</li><li><input type="checkbox"/> Employee Assistance Program (EAP) or Employee and Family Assistance Program (EFAP) available to employee</li><li><input type="checkbox"/> 24–7 access to support services through the EAP or EFAP</li><li><input type="checkbox"/> Peer support program available in the workplace</li><li><input type="checkbox"/> Organization has implemented the requirements of the National Standard of Canada for Psychological Health and Safety in the Workplace</li><li><input type="checkbox"/> Other resources</li></ul> <p><i>Additional resources including Accommodation Strategies and Return to Work Strategies and Support are available at <a href="http://www.workplacestrategiesformentalhealth.com">www.workplacestrategiesformentalhealth.com</a></i></p> <p><i>Please attach a detailed job description.</i></p>	

## Part 3

### Additional comments

#### Employer's additional comments

Please add information to clarify additional expectations and prioritize the areas where you would like some suggestions that will help 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's additional comments

Additional job expectations not previously mentioned by employer:

List the areas where you would like some assistance 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 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 their 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 will you commit to that will help you successfully manage your return to work and maintain your well-being?

## Supporting Success conversation (continued)

Question:

Response:

3. What can your workplace or supervisor do to support a successful and sustainable return to work for you?

4. Are there current tasks you would like additional training or re-training on?

## Supporting Success conversation (continued)

Question:

Response:

5. How can feedback be provided to you in a positive and constructive way?

6. How often would you like to receive feedback that recognizes your contribution?

# Supporting Success conversation (continued)

Question:	Response:
7. How should future issues be managed in a way that is positive and healthy for you?	
8. When and how often should we re-visit this agreement to make adjustments?	

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

## Responding to co-worker questions

You can choose how you respond to comments or questions about why you were away and your current health status, as well as how you are coping, and why you may be doing things differently at 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 am looking forward to reconnecting with you and the team.*
- *I had a few health challenges and am now recovering but prefer not to go into specific details.*
- *Despite my recent health challenges, I am well enough to be back at work – even if I need a few accommodations to help me transition back to work successfully.*
- *I am grateful you filled in for me while I was away. I was also working really hard to get better so I could come back and do my part.*
- *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.*
- *While it may appear I'm only [doing easy tasks] [working part-time], I am well and will be transitioning back to my full workload gradually.*

Preparing for your response can help lessen the discomfort, create understanding and 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:

Additional ideas for responding to co-worker questions and comments is available at [Talking to Co-Workers](https://www.workplacestrategiesformentalhealth.com/employee-resources/return-to-work-support)  
<https://www.workplacestrategiesformentalhealth.com/employee-resources/return-to-work-support>.

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 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 help us to identify and manage potential gaps between the job expectations and the employee's capacity.

Our employee, (insert name), will meet in consultation with you to determine those job aspects that may affect (their) 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 (their) 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, non-medical 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 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.

## Sample letter for an employee to request accommodation

Here's an example of a template you can use to write a letter to your employer if you are initiating the process to request accommodation and the development of a workplace plan. Ideally, the process should begin before you return to work.

### Requesting accommodation

A workplace plan is a document that helps you identify what you need to be successful at your job. It is not a legal contract, but is actually a request from you to your employer asking for reasonable accommodation that will allow you to be successful at your job. It helps because as you develop it, it puts your suggested solutions “on paper” and gives you and your manager a way to discuss your needs. Other people could help you develop this plan including your manager, human resources representative, occupational health nurse or doctor, your union representative, or even a trusted co-worker.

Ideally, you would work together with your manager to develop your workplace plan. It does not supersede any existing company policies, collective bargaining agreements or legislation. It is developed in good faith with the intention of having you be successful at work while maintaining a balance between productivity and health. Your manager may not know how to help you. This process can give your manager ideas that are right for you.

More information about requesting accommodation is available at:  
<https://www.workplacestrategiesformentalhealth.com/employee-resources/requesting-accommodation>

Dear (employer contact – manager or HR)

I have worked hard toward my recovery and am looking forward to a successful return-to-work experience.

To help in achieving this goal, I am hoping we can work together to develop a workplace plan that focuses on my current capabilities related to the expectations of my job.

You may have heard of *Supporting Employee Success*, a tool developed by occupational health professionals, which can assist with this process. It is available free of charge at:  
[www.workplacestrategiesformentalhealth.com/managing-workplace-issues/supporting-employee-success](https://www.workplacestrategiesformentalhealth.com/managing-workplace-issues/supporting-employee-success).

I've reviewed it and it looks like a great tool to help us consider the aspects of my job that I can currently do, as well as areas where I may need accommodation.

Thank you in advance for your consideration. I look forward to beginning the process.

Sincerely,

[Your name]



## Supporting Employee Success



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A tool to help employees  
be successful at work



This resource is available for free download from  
[www.workplacestrategiesformentalhealth.com](http://www.workplacestrategiesformentalhealth.com)