

RETURN TO WORK PLAN

Returning Employee

Manager

Pre-return to work meeting checklist

This checklist is for when someone has been off work because of mental illness distress for a significant amount of time, normally more than a week, and their work contributions and patterns have been disrupted as a result. It's a good idea to have a meeting with your employee before they return to work, so you can both agree on what needs to be put in place before they return, and what other accommodations could help make their first week back at work a success.

Manager checklist:

- Have you organised a pre-return to work meeting in a relaxed, non-stressful and private location?
- Have you given an appropriate amount of notice to the employee so that they can prepare practically and emotionally for the meeting? Allow at least a couple of days.
- Do you have the information you need to update the employee on their sick leave entitlements during their time off, and their remaining leave balance?
- Do you have someone in, or associated with, your workplace that you can talk to confidentially for support and advice if needed?
- Is your HR department or advisor in the loop?
- Have you reviewed your legal responsibilities and duty of care as a manager?
- Have you let go of any biases or prejudices you may have about mental illness?

Employee checklist:

- Do you have a recovery/wellness plan (this is not essential, but can be very useful to share with your manager if you feel comfortable)?
- Have you identified some support people you would feel comfortable with your manager contacting in an emergency?
- Have you thought about any reasonable accommodations or changes that would help you to stay well and productive at work?
- Do you have any worries or concerns about your ongoing employment that you want to seek assurance from your manager/organisation about?
- Do you want to bring a support person with you to the pre-return to work meeting?

Return to work plan between manager and employee

Issue	Agreed employee/employer solutions
<p>What is in the employee’s recovery/wellness plan (if they have one) that’s relevant to the workplace? What are the practical steps that need to be agreed on?</p>	<p><i>e.g. a plan for taking medication, checking in for support, strategies to stay well, early warning signs of distress and what to do to when these arise</i></p>
<p>Are there any recommendations from the employee’s mental health clinician that need to be taken into account?</p>	
<p>What reasonable workplace accommodations can be made to assist the employee’s recovery and meet their needs?</p>	<p><i>e.g. changes to working area, changes to working hours, restructuring jobs</i></p>
<p>Is a phased approach to the level of work and/or working hours appropriate?</p>	<p><i>e.g. increase challenge and/or hours gradually over time</i></p>
<p>Are the employee’s energy levels likely to fluctuate throughout the day, and can their work tasks be managed around this?</p>	
<p>What sort of flexibility will be needed for the employee to attend medical appointments?</p>	

Return to work plan between manager and employee

Issue	Agreed employee/employer solutions
How will confidentiality be managed to protect the employee's privacy and safety?	
What information will be shared with the rest of the work team? How will the employee respond to questions about their health, their absence and any changes in work responsibilities, and how would they like their manager to communicate about them?	
Has the employee given permission to contact any support people? If so, who in the organisation can contact them, what are the contact details and in what circumstances should they be contacted?	<i>e.g. mental health worker, friend, whānau</i>
If the employee's sick leave is running low or used up, how will any further time off be managed?	
How could the employee's team and wider organisation increase their awareness and understanding around mental health in the workplace?	<i>e.g. mental health first aid training, talks from experts, mental health info in the lunch room, checking in on wellbeing at team meetings</i>

It is recommended this plan is reviewed and updated regularly until both the manager and employee agree the employee's ability to work and maintain wellness has been achieved.

Signed

Returning Employee

Manager

Next check in date

FIRST WEEK BACK CHECKLIST

A manager's follow-up for their employee's first week back at work.

The first week back at work will be an important time to set up practises that make the employee feel safe, supported and able to do their job (alongside any reasonable accommodations).

Usually, the employee's team and wider organisation will know about their mental distress or illness, so it's wise not to try and avoid or ignore the topic. Sharing this information (with the employee's consent) can be a good opportunity to have some positive conversations about mental health, and for the employee themselves to share some of their experiences if they want to, and it is safe and appropriate to do so.

Manager's checklist:

- Has the employee been welcomed back to work in an appropriate, supportive and low-key way, so there are no uncomfortable silences and whispers across the wider team?
- Has the employee had an opportunity to tell the team about their absence and experience in their own words?
- Have the rest of the team been informed of any changes in work patterns? Have they been involved in any decisions resulting in changes to their work from putting in place these changes?
- Are regular catch-ups scheduled with the employee, so you can check in on how the agreements are working and any adjustments that could be made?
- Is the HR advisor being kept in the loop?
- Is it clear what work is required by the employee and to what standard, and do you have a supportive process in place to monitor this?
- Is the employee willing to share any difficulties (and successes) that they are experiencing relating to their mental health and work?
- Have you identified any potential physical or mental safety concerns and covered them off in your Health and Safety plan?