



Return-To-Work Toolkit

Guide for a healthy recovery from
psychological work-related injury

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The Workers Compensation Board (WCB) of Prince Edward Island promotes safe workplaces through education and enforcement of safety legislation and provides insurance coverage for work-related injuries and illnesses when they happen.

The purpose of this resource is to provide practical information and tools to facilitate returning to work after a work-related psychological injury.

Please contact us if you have any questions or concerns about this toolkit, our programs or services.

The WCB is here to help.

Contact information



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The Workers Compensation Board of PEI wishes to acknowledge @MyWorkplaceHealth, in partnership with WorkSafe Saskatchewan, for the generous use of its toolkit materials.

Last updated: December 2024

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CHAPTER 1—THE IMPORTANCE OF A RETURN-TO-WORK (RTW) STRATEGY

1.0 Introduction

The purpose of this toolkit is to help employers:

- Get comfortable talking to workers about mental health challenges in the workplace
- Recognize the signs and symptoms of mental health issues
- Assess the accommodation needs of a worker
- Develop accommodation strategies
- Develop return-to-work (RTW) strategies for employees who take a leave of absence due to mental health issues

1.1 The importance of work to our mental health

Work is an integral part of most of our lives – and can have a significant impact on our psychological health, positively and negatively.

The positives:

Work can contribute positively to our mental health by providing a sense of purpose and accomplishment. Work provides a paycheck, which helps us live the life we want to live and helps us achieve other important life goals. Another positive part of work is relationships. Interacting, contributing, going out, connecting, networking, and supporting others is good for our mental health.

The negatives:

Although work alone may not be directly or indirectly related to the development of psychological conditions, it can play a triggering or worsening role. Many work-related factors can impact our mental health. For example: job insecurity, lack of clear leadership and support, heavy workload, work-life imbalance, and interpersonal conflict.

When we are in a civil and respectful work environment, where we are treated with kindness and collegiality, we thrive. And, when we feel supported by our workplace when dealing with any kind of challenge like a death, a family crisis, a physical health diagnosis or injury, or an emotional or psychological health issue – we are more resilient. We recover faster physically and mentally, and our commitment, engagement and loyalty to our workplace increases.

Supporting workers when they're off work and making sure to have psychologically healthy and safe approaches to return to work is good for organizations, and workers.

1.1 Defining RTW

What is return to work (RTW)

Return to work is an integral part of a person's recovery and health outcomes after experiencing a work-related injury or illness. A RTW program is a collaborative and planned effort which facilitates a timely and safe RTW. A best practice RTW program can use the S.P.I.C.E. model as a guide.

**A best practice RTW program can use
the S.P.I.C.E. model as a guide**



S – SIMPLICITY

Keeping things simple. Avoid overcomplicating your program by removing confusing steps and processes.

P – PROXIMITY

Keep the workers connected while they're off work by maintaining close proximity to the work environment. This can be as simple as regular check-ins. And making accommodations helps workers stay connected to the workplace before full recovery.

I – IMMEDIACY

Make sure injuries are immediately reported. Respond quickly with support, offer early accommodations, and be ready to adjust plans as needed.

C - CENTERING THE WORKER

The worker plays a significant role in their successful RTW outcome. Create inclusive and interactive processes to capture their needs and input on what they think is necessary for a successful RTW.

E – EXPECTATIONS

Expect a good outcome. Most workers can successfully return to work, and everyone involved should anticipate a successful RTW.

Why is RTW the right thing to do?

Work is an important part of life and fundamental to our sense of wellbeing. It provides a sense of dignity, accomplishment, and provides value to the community and to society. There are also the known advantages linked to having an income, to learning and to participating in the goals of an organization.

One of the most significant impacts of a work-related injury or illness to a worker is the loss of livelihood. According to the National Institute of Disability Management and Research, a disability and the following absence from work profoundly affects workers' lives.

This includes their connection to the workplace, their ability to earn a living, their role in the family, and their overall health and well-being. The longer a worker is away from work, the more there will be human, social, and economic harm.

RTW is the only outcome that can prevent the loss of livelihood and the accumulated harm caused by long and unnecessary work disability. Timely and safe RTW supports the worker during this vulnerable time. It recognizes that even if a worker can't perform their original job, they can still contribute valuable work with or without accommodations.

Providing accommodations for timely and safe RTW allows workers to return to work quickly and safely, leading to better health outcomes compared to recovering entirely at home.

1.3 Legislative requirements

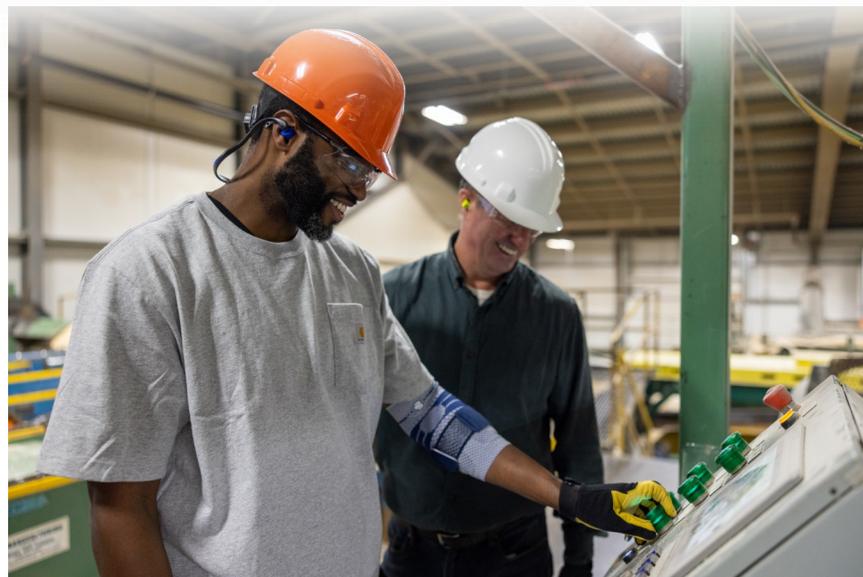
Duty to accommodate

Employers are required by law to accommodate workers with disabilities associated with psychological illness. Accommodation should be facilitated to the point of undue hardship.

Undue hardship

The duty to accommodate is not limitless. The duty to accommodate ends when an employer reaches the point of undue hardship. Undue hardship is a point when the accommodation(s) would be prohibitively expensive or create a health or safety risk.

See [PEI Human Rights Commission](#) for more detailed information.



Key takeaways

- When accommodation is needed, the employer should take prompt action.
- Workers have a right to privacy and confidentiality.
- An employer must use the least intrusive ways possible when requesting medical information to confirm:
 - The existence of a disability and need for accommodation.
 - When accommodations the worker needs.
 - Any restrictions or limitations that would have an impact on the essential duties of the worker's job and inform the need for accommodation.
- Accommodation is a collaborative process. Employers should share a list of all accommodation options, and then work with the worker to develop a personalized approach to accommodation.
- An employer's duty to accommodate means providing reasonable adjustments to accommodate the worker. The employer may be required to cover costs related to the accommodation.

1.4 Benefits of RTW

Benefits for the worker

- Promotes physical health, well-being and recovery
- Promotes psychological wellbeing
- Assist in preventing work disability
- Preserves self-identity and self-esteem
- Maintains social bond with coworkers
- Maintains occupational bond with employer
- Protects worker benefits and financial stability
- Protects employability
- Reduces impact of disability on families

Benefits for the organization

- Promotes a fair and consistent treatment of all workers
- Prevents loss of valuable worker skill, knowledge, and experience
- Impacts WCB insurance premiums
- Decreases the likelihood of a company being surcharged
- Increased the likelihood of a reduction in the industry rate over time
- Maintains chain of communication between all parties involved in the RTW process
- Minimizes the impact of work-related injuries and illnesses on productivity
- And, it's the right thing to do

**Getting back is part
of getting better**

1.5 Common barriers to a timely return to work

Psychological illness is the leading cause of disability worldwide and can have a profound impact on quality of life and productivity. Returning to the workplace after taking a leave of absence due to mental health challenges can be uncertain for the worker and a difficult task with supportive best practices.

To improve the likelihood of a timely return-to-work, focus on the following best practices:

- Stay in touch with the worker
- Provide support and demonstrate goodwill to help them return to work successfully
- Include the worker in developing their RTW plan
- Understand and address any concerns the worker may have about returning to work
- Collaborate with the worker on accommodation solutions
- Create a clear and understandable RTW process

Without appropriate support, accommodations or interventions, the chances of a worker returning to work begins to decline over time.

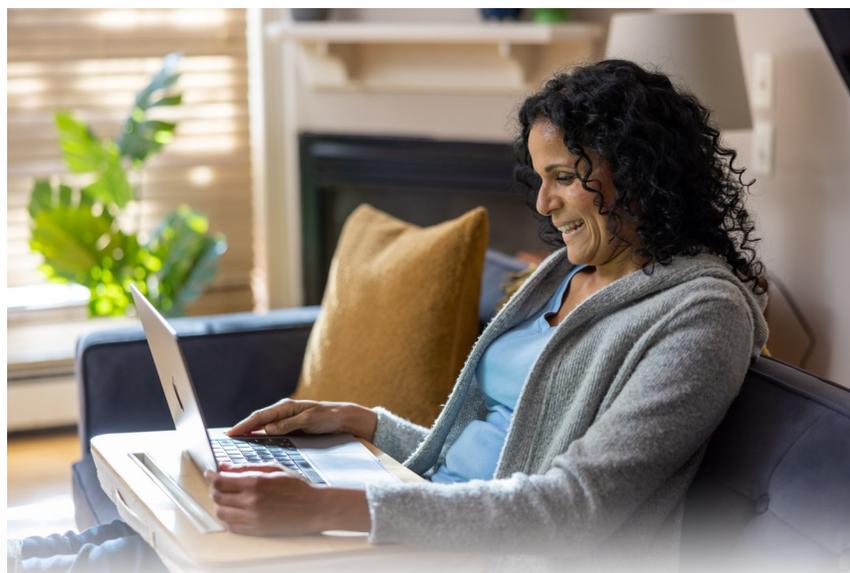
- After a 6 months absence, there is a 55% chance of returning to work
- After a 1 year absence, there is a 32% chance of returning to work
- After a 2 year absence, there is a 5%¹ chance of returning to work

Note 1: 1 IAIABC Disability Management and Return to Work Committee. (2016). Return To Work: A Foundational Approach To Return To Function.

Reflexion

As an employer, take the time to consider the serious negative impacts that can come up when best practices are not followed for supporting a worker on leave.

Visit our website wcb.pe.ca for more information and additional resources.



CHAPTER 2—PSYCHOLOGICAL HEALTH AT WORK

2.0 Understanding psychological health at work

Poor physical and mental health is the result of a complex interaction between individual and environmental factors, including but not limited to:

- Family history of illness and disease
- Health behaviours such as smoking, exercise or substance use
- Health risks such as exposure to harmful chemicals
- Genetics
- Personal life events, circumstances and history
- Access to supports such as timely health care or social supports

How can the workplace contribute to health?

Work can contribute to psychological health and wellbeing as well as psychological health problems in many ways.

Many aspects of the work environment can be modified to promote psychological health and wellbeing and remove, or reduce, negative contributors to poor psychological health outcomes.

Positive contributors to psychological health and wellbeing include finding meaning in work and stability of the work environment. In addition, diverse, equitable and inclusive environments create belonging.

What is psychological health?

It's a state of wellbeing in which the individual realizes their own abilities, can cope with the normal stresses of life, can work productively and fruitfully, and is able to make a contribution to his or her community.

(World Health Organization, 2018)

What is a psychological injury?

It's a psychological injury that's diagnosed by a psychologist or a psychiatrist using the Diagnostic and Statistical Manual of Mental Disorders (DSM), arises out of and in the course of a worker's employment. This psychological injury can be the result of a one-time event or of cumulative work-related traumatic events or harassment.

Can the workplace cause psychological injuries?

A psychologically unhealthy and unsafe workplace may contribute directly to feeling demoralized, depressed and anxious. Exposure to work-related traumatic events and harassment can contribute to the development of mental health problems.

Can the workplace make pre-existing psychological illness worse?

Work can contribute to psychological health problems in many ways. Work-related factors may increase the likelihood of a psychological illness, make an existing disorder worse, or interfere with effective treatment. Workers can also develop unhealthy lifestyle practices which can impact their physical and psychological health.

What is the WCB's coverage for psychological injuries?

In PEI, psychological injuries diagnosed following work exposure to traumatic event(s) and work-related harassment are covered. This could be an acute reaction to a single event or to cumulative events.

2.1 Leave of absence: impact on mental health

Workers who are at work or may be absent from work due to psychological illness experience a variety of emotions, such as uncertainty, fear of stigma, feelings of isolation, shame, and worry about their employment. Here are **four proactive approaches** to implement that will help promote feelings of support, care and goodwill.

1. Create clear and understandable processes

Workers often find the processes of disability leave very confusing. Make sure there are clear and understandable processes for disability leave, accommodations, and supportive transitional work.

2. Prevent unnecessary delays

Unnecessary delays in processes and in making return to work possible increase the feelings of uncertainty for the worker. Make sure you are timely in filing claims, communicating, and engaging with the worker.

3. Remove uncertainty

Recognize the impact that the psychological injury may be having on the worker. Make it clear you will accommodate. Collaborate with the worker in finding solutions and creating a RTW plan. Find ways to help support the worker to perform their job.

4. Create clear RTW plans with the worker

Make sure RTW plans have a start date and end date. Make sure the plan includes logical transitions back to regular duties, and the ability to adjust along the way. Allow room for workers to adjust and manage their situation to be successful. Rigid plans tend to fail. The opposite is also true in that open-ended plans with little structure only add to the feeling of uncertainty.

2.2 Indicators of mental health issues

Like our physical health, our mental health exists on a continuum. Multiple, everyday factors can significantly impact our mental health. Chronic stress relating to relationships, work demands, finances, and physical health can contribute to mental health conditions.

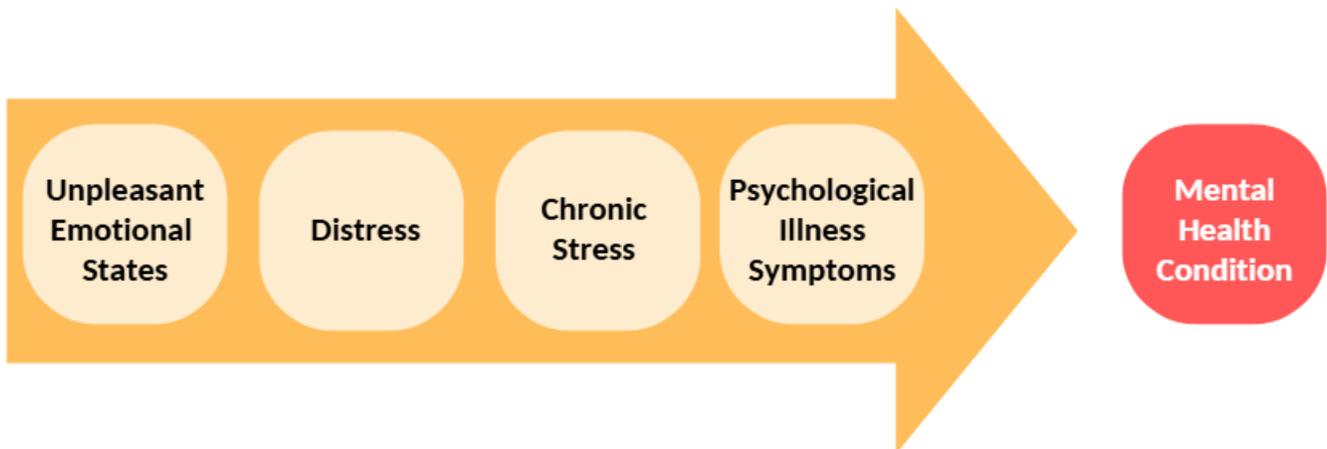
Some people will share about their struggles, but most often, issues present as performance issues.

When mental health issues show up as performance issues, it can look like:

- Issues concentrating or problem-solving
- Avoiding of coworkers
- Feeling fatigued
- Acting withdrawn or disengaged from work
- Increased conflict with coworkers
- Reduced productivity

Mental health issues can also show up as physical symptoms, including:

- Musculoskeletal disorders, chronic pain
- Headaches, gastrointestinal issues
- Sleep dysfunction
- Cardiovascular disease
- Diabetes, hypertension



It's important for supervisors and managers to recognize signs and symptoms of mental health challenges at work before assuming it's just performance issues.

See **Duty to Inquire** on page 15.

2.3 Recognizing warning signs

Physical and psychological health change daily. We have good and bad physical and psychological health days. Over time, we can become skilled at recognizing signs and symptoms of when our health is not at its best. Leaders, managers, supervisors and coworkers are more likely to effectively intervene when they recognize signs and symptoms in themselves, and in others.

IMPORTANT TO NOTE

It's not the employer's role to diagnose physical or psychological illnesses.

A PSYCHOLOGICALLY HEALTHY WORKER	WARNING SIGNS	A PSYCHOLOGICALLY UNWELL WORKER MAY HAVE
Is energized	Aches, pains, or sore muscles	Sleep problems
Sleeps well	Decreased energy	Changes in their weight
Manages stress	Anxious or irritable	Depressed, anxious or fearful feelings
Is confident	Concentration problems	Troubles controlling their thoughts
Has good self-care practices	Overwhelmed	Substance abuse issues
Keeps regular schedule	Lower productivity	Difficulty functioning at work
	Withdrawn	Poor self-care of hygiene



Visit our website wcb.pe.ca for more information and additional resources.

CHAPTER 3—A GUIDED RETURN TO THE WORKPLACE

3.0 Common barriers to mental health accommodation and RTW

When it comes to mental health struggles in the workplace, our first thought might be to stay quiet. This might be because we don't want to overstep by asking personal questions, or we are just hoping that the issue resolves itself. When a worker needs to take a leave of absence or requests accommodating relating to mental illness, it's understandable for an employer to feel uneasy about how to proceed.

As an employer, you might be thinking:

“How do I talk to the workers about what's going on?”

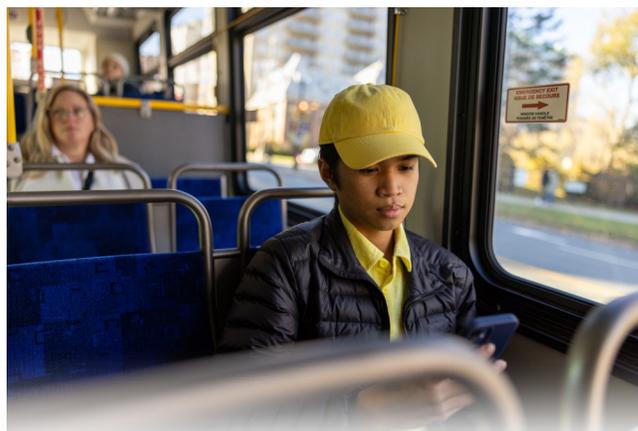
- As a leader, manager or supervisor, you don't need to have the perfect words to start a conversation about mental health struggles in the workplace. You just need to say something.
 - You can start by saying “I've noticed you haven't been your usual self lately. What would be helpful for you at this moment?”

“What am I allowed to say?”

- Workers have a right to privacy, so it's understandable if you're not sure what to say.
 - The details the worker offers will depend on their relationship with you.
 - Maintain confidentiality.
 - Keep the conversation focused on work-related functions, NOT on their mental health condition.

“Can I ask for a diagnosis?”

- Knowledge of the precise medical diagnosis isn't necessary to provide accommodations to the worker.
 - Asking for details about the name of the condition, test results, treatments, etc., should be avoided.
- Workers have a right to privacy and are only required to disclose information related to the limitations associated with their condition.



“Do I need to ask for a medical opinion?”

- As an employer, you can request confirmation that a medical condition exists when accommodation is needed.

“What kind of accommodation can I offer?”

- There are a variety of accommodation strategies. Understanding the interaction between job requirements and the limitations of the worker can help you determine an ideal accommodation strategy.
- See page 20 for examples of accommodation strategies.

“How will the worker return to the workplace after a leave of absence?”

- There are several things that can help a successful return to work after a leave of absence due to mental health.
 - Developing a RTW plan prior to before the leave starts.
 - Staying in touch during the leave.

“I’m not equipped for this.”

- It can be overwhelming to feel like you’re not equipped to handle employee’s mental health challenges, but there are free resources that exist.
- See sections 3.1, 3.2, 3.3, 3.4 and 3.5 for some helpful tips.

3.1 Duty to inquire: getting a medical opinion

Psychological disability is any psychological illness that limits a worker’s ability to function in their role at work.

When something impacts a worker’s performance, employers have the responsibility to determine if the issue comes from a physical or psychological disability. This means that they have a duty to inquire about the existence of a disability. If a disability exists, the employer must accommodate the disability. In this toolkit, we’ll only discuss psychological disabilities.

Why and when to inquire?

An employer must inquire about the existence of a psychological disability to prevent discriminatory termination or disciplinary action.

An employer has a duty to inquire when the worker:

- Demonstrates behaviour changes, performance issues or persistent interpersonal conflict.
- Requests accommodation or a leave of absence.
- Informs management of the existence of a disability.
- Or when the employer has a reasonable basis to suspect a worker may have a disability.

How does the employer fulfill their duty to inquire an accommodation?

Regardless of who initiates the accommodation process, the employer is entitled to relevant information about the worker's needs to determine how to accommodate the worker, and the worker is obligated to cooperate.

The medical information will allow the employer to make an informed decision about reasonable accommodation options.

Employers can request medical documentation to help understand if the worker has a disability and, if so determine:

- The relevant restrictions or limitations associated with the medical condition.
- What accommodations might be needed.
- Whether the worker can perform essential duties of their position with appropriate accommodation.
- Whether the worker needs to move to a different positive due to their accommodation requirements.
- Whether the worker needs to be off work, and if so, for how long.

To have the right for disability accommodation, the worker must provide the above information from their health care provider or psychologist.

Employers must keep in mind that requesting medical information for the accommodation process requires the balancing of two competing rights: the employer's right to manage the workplace and the worker's privacy rights.

When asking for medical information to support an accommodation request, employers must use the least intrusive means possible and respect the worker's privacy rights. In most cases, the necessary medical information can be provided by the worker's health care provider or psychologist.



The employer should provide the health care provider with the following information:

- Descriptions of the worker’s role and responsibilities.
- The worker’s schedule.
- Whether the worker is in a safety-sensitive position.
- Any other relevant information that is particular to the workplace.

The employer should ask the following questions:

- Does the worker have a disability that requires accommodation?
- What accommodation(s) does the worker require?
- **For example:** are there any restrictions or limitations to performing the work?
- What is the worker’s prognosis? Is it temporary or permanent?
- If the worker is off work, are there specific recommendations for accommodation that will facilitate a safe and successful return to work?
- For a worker in a safety-sensitive position, is the worker medically fit to safely perform their job?
- Does the worker require medication where side effects may prevent them from working in their safety-sensitive position?

3.2 Talking about mental health: conversation tips

The goal of this conversation guide is to get employers comfortable with talking to workers about mental health concerns. As a leader, selectively sharing personal experiences with your own mental health can encourage others to speak about their own struggles.

<u>STAGE 1</u> Start the conversation	<u>STAGE 2</u> Find a solution	<u>STAGE 3</u> Work out the details	<u>STAGE 4</u> Check-ins
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Here are some talking tips for each stage of the conversation

STAGE 1—GET THE CONVERSATION STARTED

- Keep language focused on function, not performance
- Be supportive

“I’ve noticed you haven’t been your usual self lately. What would be helpful for you at this moment?”

“I’ve noticed that the regular quality of your work has dropped lately, and you don’t seem like your usual self. I’m wondering if you have some time to chat?”



STAGE 2 - FIND A SOLUTION

- Be open and facilitate the use of available resources
- Don't offer advice or try to find the problem

"How can we best support you right now?"

"What can I take off your plate?"

"Let's discuss the supports we have for workers, such as EAP, sick benefits, counselling, etc., and find out what might work for you."

"What kinds of changes to your day-to-day activities or work environment would help?"

STAGE 3 - WORK OUT THE DETAILS

- Reinforce confidence
- Discuss a RTW plan

"Any information we request from you will be on a need-to-know basis and will be kept completely confidential."

"Let's work together to create a RTW plan that you feel is supportive and help you return to work successfully."

"What would you like coworkers to know? What are you comfortable for us to share with coworkers?"

STAGE 4 - CHECKS-INS

- Keep the worker connected to the workplace
- Promote regular check-ins, for example, calling the worker on a regular schedule, like every two weeks

"How have you been?"

"Is there anything we can do to help you out?"

"We miss you."

"There's an event that's coming up on [include date] and you're more than welcome to come and join us. We would very much like to see you if you feel up to it."

3.3 What is accommodation

Accommodation is a way of supporting workers with mental health challenges to make sure that they remain productive and healthy at work. Accommodation does not require excessive spending by the organization, but rather involves the workplace increasing their flexibility.

Tips for accommodating workers:

- Listen to the worker's unique situation
- Emphasize trust, integrity, and confidentiality
- Gather information from their health care provider if needed
- Be flexible
- Schedule frequent check-ins
- Reduce stigma in the workplace through awareness and education
- Reinforce the worker's value to the organization

Four easy steps to establish accommodation

Step 1 – Recognize the need for accommodation

- Encourage workers to come forward if they are experiencing difficulties.

Step 2 – Conduct a needs assessment

- Discuss how the worker's unique needs can be met.
- Avoid asking for details about private mental health concerns.

Step 3 – Create an individualized plan

- Discuss with the worker the accommodations that can be implemented.

Step 4 – Monitor and schedule regular check-ins

- Meet with the worker to discuss how accommodations are working out for them.



3.4 Accommodation strategies to consider

These accommodation options are presented in alphabetical order to make it easier to read.

Strategy	What that means
Modify the job role	Make reasonable modification to job duties or reassign the worker to a new role.
Modify the supervision	Discuss the best ways to provide feedback and instruction. Schedule more frequent meetings with workers.
Modify the work environment	Alter the lighting, noise or scent of the workplace. Offer work from home options if possible.
Open communication	Encourage workers to approach supervisors or managers with any concerns. Schedule frequent check-ins.
Provide flexible scheduling options	Determine the start and end times that work best with the worker's needs. Encourage more frequent breaks to replenish energy.
Provide individualized training	Use individualized training approaches that help comprehension and memory.
Provide remote work options	Allow workers to work from home if possible. Check in with the worker frequently to make sure they remain connected to the workplace.
Reduce distraction	Reduce workplace noises and distractions. Ask the worker how the environment can work better for them.
Reduce exposure to stress	Provide the opportunity for debriefing after stressful incidents. Provide opportunities for emotional intelligence training.

3.5 Developing a RTW strategy

When a worker takes a leave of absence, it's crucial to develop a detailed RTW plan. This ultimately benefits both the organization and the worker.

Tips:

- Ask the worker what their needs are for returning to work.
- Be proactive in the development of a RTW plan.
- If possible, consider a gradual return to regular work hours and responsibilities over time.
 - This allows workers to get back into the habit of going to work and build up a tolerance to work activities.
- Set specific goals and milestones for returning to work.
- Maintain contact during the leave. Share information about what's happening at the workplace.
- Schedule regular check-ins to monitor RTW progress.
- Treat the worker with respect and proactively work to address mental health stigma in the workplace.

Example of workplace situation that needs a RTW plan

Rosie is an administrative assistant who works from home. One of Rosie's clients started calling her work cell phone repeatedly to insult, threaten, and berate her. Rosie requires the following accommodations upon returning to work:

- Flexible scheduling to accommodate low energy levels early in the morning.
- Modified job role where contact with customers is limited.
- Individualized training to develop strategies to communicate with upset customers.
- Gradual return to full time hours.

Here's a sample RTW schedule to address Rosie's situation.

PHASE 1			
	Work Hours	Lunch	Job Duties
Week 1 + 2	3 days per week 12 p.m. to 4 p.m.	n/a	Reorientation to her administrative role with duties that do not require her to communicate with clients.
PHASE 2			
Week 3	3 days per week 10 a.m. to 4 p.m.	30 min.	Continue with administrative duties that do not require client communications, individualized training to support managing difficult clients.
PHASE 3			
Week 4	4 days per week 10 a.m. to 4 p.m.	30 min.	Continue with administrative duties that do not require client communications, continued individualized training to support managing difficult clients
PHASE 4			
Week 5	5 days per week 10 a.m. to 5: 30 p.m.	30 min	Return to regular job duties with limited customer contact, to be increased based on Rosie's feedback at weekly check-in meetings that continue for an additional 8 weeks with her manager

3.6 About MyWorkplaceHealth

MyWorkplaceHealth

Dr. Joti Samra, R. Psych., CEO and Founder

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Dr. Joti Samra, R. Psych, is a national thought leader on issues relating to psychological health, wellness and resilience. She is the CEO and Founder of MyWorkPlaceHealth, a full suite national workplace consulting firm and Clinic Director of Dr. Joti Samra & Associates, a clinical coaching practice.

Dr. Samra is a highly regarded expert in psychological health and safety (PH&S). Over the past two decades, she has been involved in numerous national initiatives that have contributed to policy change in Canada, and is a founding and ongoing member of the CSA Technical Committee that developed the National Standard of Canada for Psychological Health and Safety in the Workplace. This Standard is the first of its kind in the world, and has shaped policy development for workplace PH&S at the International Organization for Standardization (ISO) level.

Dr. Samra is lead research scientist who created Guarding Minds at Work: A Workplace Guide to Psychological Health and Safety, in which the psychosocial factor frame adopted by the Standard was developed. She also the developer of the Emotional Intelligence Self-Assessment, and the Psychologically Safe Leader Assessment, assessment and action planning resources that align leader's skills with the requirements of the Standard. Dr. Samra and her team have extensive expertise in helping organizations implement initiatives related to workplace PH&S including implementation of the CSA Standard; providing leadership development, training and coaching services across a broad range of areas, including emotional intelligence, psychologically safe leadership and mental health awareness; and, providing a breadth of services to enhance employee psychological health, wellness and resilience.

Visit our website wcb.pe.ca for more information and additional resources.

Appendix A – Employer Checklist

√	Checklist for accommodation and RTW planning
	Take notice of behavioural changes, performance issues, or interpersonal challenges amongst workers
	Inquire about the possibility of a disability before termination or disciplinary action
	Consider what kind of accommodation you could offer workers facing psychological challenges
	Share available accommodation plans
	Make sure workers are aware that there are RTW plans for workers on leave
	Develop individualized RTW plans for any worker going on leave.
	Encourage a gradual return to the workplace
	Schedule regular check-ins once the worker has returned to the workplace
	Make sure limitations are clearly defined