

Worksite Assessment Checklist & Return-to-Work Plan Documentation

This checklist provides a structured approach to conducting a worksite assessment to inform return-to-work planning, including assisting appropriate duty selection, equipment needs, restrictions, modifications or compensatory strategies.

Note: The *Vocational Assessment* should be completed before this *Worksite Assessment Checklist* so that the client's injury and individual circumstances are understood. The template contains common areas to consider; however, there are likely to be additional workplace considerations specific to some workplaces and client circumstances. Refer to Appendix 3 of the intervention manual for suggestions to manage injury implications in the workplace.

Workplace considerations	Implications of injury <i>Avoid tasks, modify task/environment, use equipment, use compensatory strategy)</i>
1. Access and environment	
<input type="checkbox"/> Entry, exits, stairs, lifts, distances to walk <input type="checkbox"/> Toilets, tearoom, quiet area <input type="checkbox"/> Can they access all areas they need to? <input type="checkbox"/> Safety (e.g. machinery, forklifts, vehicles) <input type="checkbox"/> Getting on and off vehicles <input type="checkbox"/> Cluttered work areas <input type="checkbox"/> Confined space/noisy open plan office <input type="checkbox"/> Indoors/outdoors - uneven ground <input type="checkbox"/> Temperature - hot/cold, exposed to weather <input type="checkbox"/> Lighting - too bright/poor light/window glare	
2. Physical demands	
<input type="checkbox"/> Prolonged sitting, standing, walking <input type="checkbox"/> Ergonomic desk set up, monitor glare, keyboard and mouse use <input type="checkbox"/> Bending, squatting, kneeling, crawling <input type="checkbox"/> Lifting, manual handling <input type="checkbox"/> Upper limb use/fine manipulation <input type="checkbox"/> Working in awkward positions <input type="checkbox"/> Working at heights/ladders <input type="checkbox"/> Time pressure or self-paced <input type="checkbox"/> Opportunity for planned rest breaks	

3. Cognitive demands

- Sustained concentration, distractions
- Opportunity for planned rest breaks
- Learning and retaining new information
- Familiarity with role/duties
- Following procedures, instructions
- Accuracy and attention to detail
- Multi-tasking, interruptions
- Deadlines, time pressure or self-paced
- Complexity of analysis, planning/problem solving
- Numeracy and literacy (e.g. composing emails)
- Communication at meetings, with clients, colleagues, customer service
- Supervision responsibilities

4. Transport to work

- Can they drive or do they require support/assessment to return to driving?
- Is parking available?
- Is public transport available, can they use it?
- Can someone provide transport?
- Is taxi or ride sharing service recommended?
- Consider work hours to enable travel out of peak hour
- Is working from home an option?

5. Safety risks

- Which duties pose potential safety risks to the individual, their colleagues, clients/customers or to the business/organisation?
- What are the ramifications of mistakes?
- Is supervision or checking of work required?
- Are there any equipment safety concerns (power tools, dangerous chemicals, ladder use)?
- Operation of machinery (driving of trucks, forklifts, excavators, cranes, factory based machines)
- Responsibilities (distribution of medication, patient care, business decision making, customer interactions)

6. Employer needs

- Consider employer capacity to provide alternative or modified duties
- Consider employer burden when additional supervision or checking of work is required
- Consider most suitable days/hours of work (e.g. to attend team meetings, work when support is available)
- Location: office based/home based, travel requirements, client visits
- Consider specific restrictions to address safety concerns
- Advise of any specific insurer support or requirements

7. Client needs (days & hours, duties, restrictions, strategies, monitoring)

- Establish days of work and daily hours considering:
 - Therapy, medical, family or other commitments
 - Level of endurance, medical recommendations
 - Consecutive or non-consecutive work days
 - Need for rest breaks, quiet time/space
 - Future treatment needs (e.g. surgery therapy, medical, family commitments)
 - Ensure the duties can realistically be performed in the number of hours to be worked
- Establish client duties taking into account supports and restrictions such as:
 - Medical restrictions (lifting capacity, ladder use)
 - Need for workplace buddy/mentor/supervisor
 - Need to avoid/modify duties or role (e.g. avoid deadlines, remove supervisory responsibilities, reduce number of duties)
 - Compensatory strategies (e.g. checklists, written instructions, diary/calendar use, to do lists)
- Establish how client performance will be monitored or competency/safety assessed (self-report, colleague feedback)
- Establish appropriate start date and timeframe for next client/employer review (at or before 4 weeks of starting)

Return-to-Work Plan Document

Combining information from the *Vocational Assessment* and *Worksite Assessment Checklist* a return-to-work plan is documented for the client, employer, treating team/doctor and insurer (if relevant).

Suggested inclusions for the return-to-work plan include:

- Client details
- Injury details including medical restrictions and current therapy commitments
- Client’s functional capacity (physical/cognitive limitations, equipment needs)
- Client’s occupation, employer details, summary of role and working hours
- Pre-injury duties and recommended duties:

Pre-accident/normal duties	Proposed duties of this plan
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.....

- Recommended modifications, equipment needs, compensatory strategies to address any limitations
- Travel to and from work, home based/office based
- Support needs/supervision/monitoring of performance
- Timetable of days of week and hours using template below:

Week of program						
Week start date						
Monday	.....	.....	.....	.....	.....	.....
Tuesday	.....	.....	.....	.....	.....	.....
Wednesday	.....	.....	.....	.....	.....	.....
Thursday	.....	.....	.....	.....	.....	.....
Friday	.....	.....	.....	.....	.....	.....
Saturday	.....	.....	.....	.....	.....	.....
Sunday	.....	.....	.....	.....	.....	.....
Weekly total hours						
Next review date/time/location:						