Workplace Strategies for Mental Health

Compliments of Canada Life



Supporting employee success

A tool to help employees be successful at work

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Introduction

A psychologically safe approach for employer–employee collaboration to meet job expectations

This free tool offers practical and effective strategies to help an employee do their job successfully while maintaining their own health and wellbeing. The process addresses the psychological, emotional, behavioural, cognitive, and physical demands of the job, and complements task–focused performance management.

Supporting employee success has multiple uses

It allows an employer and employee to collaborate on strategies that support the employee's ability to meet job expectations at work. The level of complexity will determine the time and effort required to complete a work plan, but all three parts could be done over 2–3 business days.

It can be used as part of a safe and respectful process for:

- Onboarding to clarify expectations
- A sustainable return to work strategy
- Performance management
- Effective formal or informal accommodation

Supporting employee success is not a medical process

This process focuses on job expectations and supporting employee ability to meet those expectations. It doesn't require information or a discussion about diagnosis or symptoms. The supporting employee success process focuses on abilities and strategies that may support success on the job.

Supporting employee success does not specifically address potential legal requirements

While this process can be part of an effective accommodation, it doesn't replace legal advice with respect to requirements under employment, human rights, accessibility or other legislation.

This resource was originally created by Dr. Ian M. F. Arnold and Suzanne Arnold, PhD, with input from Dr. David Brown, Dr. David Posen and Susan Jakobson. Thanks to members of the Institute for Work and Health, Canadian Labour Congress, Human Resources Professionals Association, Donna Hardaker, Stéphane Grenier, and Judy Kerling for their valuable contributions. The 2024 update was informed by Addie Greco–Sanchez, Anne Nicole Sta. Ana, Jill Magis, Mariam Harutyunyan, Raelene Thorne and Sarah Jenner. Supporting Employee Success was commissioned, funded and adapted by **Workplace Strategies for Mental Health**, compliments of Canada Life, with technical development and support from the **Canadian Centre for Occupational Health and Safety.**

How to use Supporting employee success

Throughout this process, the employer can be a small business owner, manager, team lead, human resources professional, or any other person familiar with the employee's job role.

A flexible process

There are many ways this tool can be helpful.

- For complex situations involving return to work after a leave, accommodation for a disability, or behavioural or performance issues, the entire process, **Steps 1–3**, are recommended.
- Sometimes only part of the process is necessary. For example, if there is role confusion, you may just want to do **Step 1** to review and update the job description together.
- If the only concern is one specific task, you may want to use the **Supportive task improvement process** instead.
- Where there is a high trust relationship, you may be able to skip directly to **Step 3**, the Supporting success conversation and start creating a plan together.

1. **Review job description together** to ensure it's relevant. It should reflect the actual work expected, without any required accommodation. If the job description doesn't currently reflect the actual work, consider updating it.

2. **Address specific job expectations** and identify areas of concern. These should relate to behavioural and job expectations. Consider as well, potential solutions to support employee success on the job.

   2a. Employer selects relevant job expectations from the list of 18 job expectations. They select only those relevant to the employee's current situation and add others if necessary. For each job expectation, the employer also reviews the list of potential solutions they want to offer to the employee. Additional solutions can be added and those that are not practical can be removed.

   2b. Employer clarifies job expectations: Complete the employer section for each relevant job expectation.

   - Check the level of expectation required for this job role.
   - Describe how this level of expectation is important to the job. Be as specific as possible about how success in this area will be measured.
   - Review potential solutions before forwarding the employee section for completion. Ensure that only those which are possible and practical for this specific job are left for discussion.
   - Also add any potential solutions you feel could be helpful.
   - Send the completed form to the employee.

   2c. Employee completes assessment of current abilities and potential solutions.

   - Check your current level of ability.
   - Describe how this level of ability might impact your job.
   - Review the potential solutions suggested. Ask someone you trust for help. This could include a health professional, union representative, human resources or colleague.
   - Add your comments about how potential solutions can help you do your job.
   - When complete, return to the person who sent it to you.
   - Review the **Supporting success conversation questions** to prepare for the discussion with your employer.

   2d. Prepare for the Supporting success conversation. Review the potential solutions that the employee has indicated would support their success. Consider if any may need further conversation, organizational approval, funding or alternative approaches. Having solutions approved in advance can make the Supporting success conversation more efficient and effective.

3. **Create a plan together:** Meet with the employee to develop a work plan that supports them to successfully meet job expectations.

For more information about creating an effective plan, see Developing employee plans for leaders

- Read more about the entire **Supporting employee success** process.
- If you are using this process as part of an accommodation plan, helpful information can be found at **Accommodation planning for leaders**.

Job expectations

Cognitive demands

- ☐ **Adaptability and flexibility** – Working effectively while experiencing changing requirements, conditions and work responsibilities.
- ☐ **Attention to detail** – Performing work tasks well when significant attention or understanding is required.
- ☐ **Decision making** – Effectively making good decisions that consider potential impacts, mitigate or eliminate risks, and optimize benefits.
- ☐ **Problem solving and analysis** – Effectively analyzing situations and information to solve problems and develop solutions.
- ☐ **Recall** – The ability to recall and retrieve previously learned information on demand.
- ☐ **Time pressures** – Managing time and working quickly when needed to meet deadlines, without sacrificing quality.

Working with others

- ☐ **Degree of self–supervision** – Working effectively in isolation, remotely or when a supervisor is not available.
- ☐ **Degree of supervisor responsibility** – Working effectively as a supervisor. This includes respecting organizational values and policies while meeting objectives.
- ☐ **Exposure to confrontational situations** – Responding effectively when confronted with challenging individuals or situations.
- ☐ **Exposure to distressed people** – Working effectively when exposed to emotional individuals. This may be in person, over the phone, or other communication channels like social media.
- ☐ **Working relationships** – Working professionally with others including collaborating and cooperating effectively with co–workers, management and clients.

Work conditions

- ☐ **Exposure to distractions** – Focusing on work effectively despite visual, auditory or other distractions.
- ☐ **Tolerance of stressful environments** – Working effectively and calmly when personal or professional demands challenge available capabilities or resources.
- ☐ **Overlapping tasks** – Effectively prioritizing, monitoring, and completing multiple tasks or functions on time.
- ☐ **Degree of isolation** – Working effectively without regular contact with others. This could include interacting primarily through technology or infrequent face–to–face get–togethers.

Physical demands

- ☐ **Work endurance** – Effectively performing all work tasks without undue fatigue including while on regular, rotating, overnight or on–call shifts.
- ☐ **Physical job requirements** – Safely and effectively meeting the physical demands of the job without strain, injury or illness.

Other

- ☐ **Other – Any other job expectation not listed above.** This is where you can add unique expectations including job–related travel, public speaking or dealing with media, exposure to traumatic situations, work–related grief and loss, dealing with patients, clients, children or volunteers, extreme levels of responsibility for privacy, safety, security, or finances, or anything specific to the role. Although most can be dealt with in the existing expectations, focusing on those that are unique in some way may help identify relevant solutions.



1

Job expectations

Cognitive demands

Adaptability and flexibility

Working effectively while experiencing changing requirements, conditions and work responsibilities.

☐ **Employee is meeting or exceeding this expectation.**

Employer assessment of current job expectations (check one)

Check one:

- ○ Very little need for adaptability required; work follows a structured routine.
- ○ Occasional need for adaptability required; most work demands follow a structured routine.
- ○ Frequent need for adaptability required to respond to changing work demands; few work demands follow a structured routine.
- ○ Constant adaptability required to respond to changing work demands; work does not follow a structured routine to manage the volume of work.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the "not applicable" box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I have no problem adapting to changing work demands.
- ○ I can occasionally adapt to changes in my work routine but prefer a structured approach.
- ○ I believe that working in an environment where flexibility and adapting to change is required could currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Please check off any of the solutions that you believe will support you to meet this job expectation. Next, comment on how each specific solution would help you do your job more effectively.

☐ The flexibility around hours of work that would be helpful is: And the reason for this is:	☐ N/A
☐ The flexibility that would be helpful around deadlines would be: And the reason for this is:	☐ N/A
☐ The flexibility around the time of day that tasks are completed that would be helpful is: And the reason for this is:	☐ N/A
☐ The flexibility around the need for travel for work that would be helpful is: And the reason for this is:	☐ N/A

☐ Providing flexibility can support the job getting done in the following ways:	☐ N/A

☐ I would benefit if routine and structure can be provided in the following ways:	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Attention to detail

Performing work tasks well when significant attention or understanding is required.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ Significant attention to detail, concentration and understanding is not required.
- ○ Significant attention to detail, concentration and understanding is required for some job tasks.
- ○ Significant attention to detail, concentration and understanding is required for many job tasks.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the "not applicable" box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I am able to concentrate on, or attend to, details at a significant level for the majority of job tasks.
- ○ I am able to concentrate on, or attend to, details at a significant level for many job tasks.
- ○ I am able to concentrate on, or attend to, details at a significant level for some job tasks.
- ○ I believe having to concentrate on, or attend to, details at a high level for the majority of job tasks presents a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job. Employee to check and comment on any ideas that they would like to explore with their employer.

☐ Training to improve understanding of essential job expectations.	☐ N/A
☐ Regular rotation of tasks/shift assignments.	☐ N/A
☐ Removal of any non–essential functions of the job, which include:	☐ N/A
☐ Break large tasks into a series of smaller tasks	☐ N/A
☐ More time to attend to work requiring attention to detail, specifically:	☐ N/A
☐ Permission for short breaks when concentration declines – For example, standing, going for a short walk or stretching can improve concentration.	☐ N/A
☐ Provide instructions and assignments in writing.	☐ N/A
☐ Create a checklist that includes each step of a task to be completed as quality control.	☐ N/A
☐ Exchange tasks with other employees that ensure the work gets done, while building on the strengths of each employee. Consider potential solutions that support good working relationships and retains equitable distribution of work. Specific tasks to exchange could include:	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Decision making

Effectively making good decisions that consider potential impacts, mitigate or eliminate risks, and optimize benefits.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ Errors in judgment or attention would have insignificant consequences.
- ○ Errors in judgment or attention would create inconvenience.
- ○ Errors in judgment or attention could create serious difficulty or significant expense.
- ○ Errors in judgment or attention could have grave or life–threatening consequences.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the "not applicable" box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ Making a decision where a level of judgment is critical is never a problem for me.
- ○ Making a decision where a level of judgment is critical is within my current capability.
- ○ Making a decision where a level of judgment is critical may require assistance.
- ○ Making a decision where a level of judgment is critical will currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as "not applicable") they think might be helpful so they can explore them with their employer.

☐ Identify the areas where an error in judgment could create difficulty, including:	☐ N/A
☐ Create checklists to guide judgment in routine tasks such as:	☐ N/A
☐ Additional training to help with decision making, specifically:	☐ N/A
☐ More time to attend to work requiring attention to detail, specifically:	☐ N/A
☐ Develop a list of areas where decisions should be discussed with others, such as:	☐ N/A
☐ Identify areas where judgments must be discussed.	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Problem solving and analysis

Effectively analyzing situations and information to solve problems and develop solutions.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

○ No analytical thinking or problem solving required in the normal course of duties.

○ 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.

○ 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.

○ 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

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the "not applicable" box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I am able to analyze information and enjoy solving complex problems on the job.
- ○ I am able to analyze information and solve challenging problems on the job.
- ○ I am able to analyze information and solve routine problems on the job.
- ○ I believe work requiring analysis or problem solving will currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as “not applicable”) they think might be helpful so they can explore them with their employer.

☐ Create a decision tree template to assist with problem solving or analytical thinking in relation to the following situations:	☐ N/A
☐ List situations where it would be best to reach out for assistance in analysis or problem–solving, including examples of safety issues:	☐ N/A
☐ Have regular check–ins during the decision–making process	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Recall

The ability to recall and retrieve previously learned information on demand.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ Basic recall skills are required for routine work tasks.
- ○ Basic recall skills are required to apply to routine work tasks that may vary from day to day in complexity and frequency.
- ○ Moderate recall ability is required for time–sensitive and more complex information.
- ○ High recall skills are required to deal with complex tasks and/or processes that also have expectations of accuracy, confidentiality, compliance and/or firm deadlines.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the "not applicable" box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- [ ] 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.
- ○ I am able to recall complex information in time sensitive situations.
- ○ I am able to recall routine information related to work tasks that may vary from day to day in complexity and frequency.
- ○ I believe recalling information and applying it to work tasks will currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as "not applicable") they think might be helpful so they can explore them with their employer.

☐ With permission, use recording devices, such as an online meeting platform, smartphone or digital recorder, to provide playback of information discussed in meetings.	☐ N/A
☐ Use a digital organizer or handwritten notes as ongoing to–do list, marking off items as they are completed.	☐ N/A
☐ Request instructions and assignments in writing to help provide clarity and improve recall.	☐ N/A
☐ Set up regular reminders of upcoming milestones, appointments or deadlines.	☐ N/A
☐ Arrange regular meetings between supervisor and employee to set priorities and keep work on track.	☐ N/A
☐ Provide retraining and/or re–orientation related to the following tasks:	☐ N/A
☐ Consider individualized training approaches such as increased learning time, reading materials in advance or applied learning to help improve comprehension and retention such as:	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Time pressures

Managing time and working quickly when needed to meet deadlines, without sacrificing quality.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ Employee is not exposed to time pressures because the work is self–paced, without rigid time constraints.
- ○ Time pressure is occasional pressure to meet deadlines or work within time constraints; the volume of work and the work pace are moderate.
- ○ 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.
- ○ 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)

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the “not applicable” box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I am able to produce high quality work while under pressure and am comfortable when faced with high volume and fast paced work.
- ○ I am able to do quality work at a moderately fast pace and can usually perform well under time pressures.
- ○ Meeting deadlines and/or dealing with pressure to perform while maintaining quality of work can be difficult.
- ○ I believe maintaining quality while keeping up with the pace of work will currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as “not applicable”) they think might be helpful so they can explore them with their employer.

☐ 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:	☐ N/A
☐ Develop a process that establishes and monitors weekly timelines for the completion of assigned tasks.	☐ N/A
☐ Establish regular times to check in with the manager or supervisor throughout more complex tasks or projects.	☐ N/A
☐ Clearly define priorities.	☐ N/A
☐ Where possible, avoid assigning tight deadlines or provide sufficient resources to effectively meet that deadline.	☐ N/A
☐ Facilitate clear communication and collaboration to ensure timely completion of each team member’s responsibilities within a project.	☐ N/A
☐ In times of pressure, the best way to give me feedback would be:	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:



2

Job expectations

Working with others

Degree of self–supervision

Working effectively in isolation, remotely or when a supervisor is not available.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ A supervisor is available at all times to offer job support.
- ○ A supervisor is frequently available during each day to provide direction.
- ○ A supervisor is available at some time each day to provide direction.
- ○ Predominantly self–supervised throughout the shift (may contact supervisor to obtain direction as needed).

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the “not applicable” box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I am able to supervise myself effectively to meet or exceed all job expectations.
- ○ If I am clear about what I am required to do, I am comfortable with supervising myself.
- ○ If I am clear about what I am required to do, I am able to self–supervise at times.
- ○ I believe not having any supervision will currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as “not applicable”) they think might be helpful so they can explore them with their employer.

☐ Create detailed task lists and timelines.	☐ N/A
☐ Provide frequent check–in opportunities.	☐ N/A
☐ Set priorities and direction for dealing with conflicting priorities.	☐ N/A
☐ Develop outcome measurements by task, day, week and month.	☐ N/A
☐ Provide a list of alternate supervisors to contact when necessary.	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Degree of supervisor responsibility

Working effectively as a supervisor. This includes respecting organizational values and policies while meeting objectives.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ Has no supervisory responsibility.
- ○ Provides work direction only and has no other supervisory duties.
- ○ Provides work direction and some elements of managing work performance with the exclusion of disciplinary action.
- ○ Has full supervisory responsibility for other employees.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the “not applicable” box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I am fully capable of carrying out my supervisory duties in a manner that aligns with organizational values and policies.
- ○ I may need some assistance in effectively carrying out my supervisory duties.
- ○ I currently find it difficult to effectively supervise others.
- ○ I believe fulfilling my supervisory responsibilities will currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as "not applicable") they think might be helpful so they can explore them with their employer.

☐ Develop a list of specific behaviours that can assist in effective supervision of others.	☐ N/A
☐ Explore supervisory behaviours that may be interpreted by others as problematic such as:	☐ N/A
☐ Develop strategies to deal with stress in the workplace.	☐ N/A
☐ Identify a mentor to help develop skills and discuss challenging situations.	☐ N/A
☐ Identify particularly challenging work relationships and brainstorm alternative responses in these situations.	☐ N/A
☐ Take part in training to enhance my supervisory skills, specifically:	☐ N/A
☐ Reduce or remove supervisory responsibilities in the following ways:	☐ N/A
Any other recommendations to support employee success in meeting this job expectation:	

Exposure to confrontational situations

Responding effectively when confronted with challenging individuals or situations.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ No exposure to confrontational situations in the normal course of duties.
- ○ Occasional exposure (up to weekly) to confrontational situations in which assistance for the employee is immediately available.
- ○ Occasional exposure to confrontational situations (up to weekly) where assistance for the employee is not immediately available.
- ○ Frequent exposure (up to daily) to confrontational situations or hostile people where assistance may or may not be available.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the "not applicable" box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I am able to effectively manage frequent exposure to confrontational situations, even when assistance may not be available.
- ○ I am able to effectively manage occasional exposure (up to weekly) to confrontational situations where assistance may not be immediately available to me.
- ○ I am able to tolerate occasional exposure (up to weekly) to confrontational situations where assistance is immediately available to me.
- ○ I believe exposure to confrontational situations will currently present significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as "not applicable") they think might be helpful so they can explore them with their employer.

☐ Review policies and practices related to confrontational situations in the workplace with the employee.	☐ N/A
☐ Provide training on managing potentially confrontational situations and the recommended responses.	☐ N/A
☐ Consider how to provide or increase support for the employee in situations that are potentially confrontational.	☐ N/A
☐ 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.	☐ N/A
☐ Allow more frequent breaks – for example, three 5–minute breaks rather than one 15–minute break.	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Exposure to distressed people

Working effectively when exposed to emotional individuals. This may be in person, over the phone, or other communication channels like social media.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ Exposure to emotionally distressed individuals in the normal course of duties is rare.
- ○ Infrequent exposure (up to monthly) to emotionally distressed individuals with whom the employee must interact in order to complete job requirements.
- ○ Occasional exposure (up to weekly) to emotionally distressed individuals with whom the employee must interact in order to complete job requirements.
- ○ Frequent exposure (up to daily) to emotionally distressed individuals with whom the employee must interact in order to complete job requirements.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the “not applicable” box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I am able to tolerate frequent exposure (up to daily) to individuals who are experiencing emotional distress.
- ○ I am able to tolerate occasional exposure (up to weekly) to individuals who are experiencing emotional distress.
- ○ I am able to tolerate infrequent exposure (up to monthly) to individuals who are experiencing emotional distress.
- ○ I believe exposure to distressed people will currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as "not applicable") they think might be helpful so they can explore them with their employer.

☐ Provide training in emotional intelligence and/or other best practices.	☐ N/A
☐ Consider how to provide or increase support in emotionally stressful situations, specifically:	☐ N/A
☐ Provide genuine praise and positive reinforcement during the work week.	☐ N/A
☐ Allow reasonable time off to attend counselling sessions or medical appointments, specifically:	☐ N/A
☐ Allow reasonable phone calls (up to 15 minutes per day, and preferably during break time) to access necessary emotional support during the workday.	☐ N/A
☐ Provide a supportive job coach	☐ N/A
☐ Allow more frequent breaks – for example three 5–minute breaks rather than one 15–minute break.	☐ N/A
Any other recommendations to support employee success in meeting this job expectation:	

Working relationships

Working professionally with others including collaborating and cooperating effectively with co–workers, management and clients.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ 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.
- ○ Infrequently required to work in co–operation with others to complete job tasks but works near others.
- ○ Required to regularly work in co–operation with and near others.
- ○ The job requires co–operation and close collaboration with others.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the “not applicable” box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ On all tasks and in all situations, I work co–operatively and collaboratively with others.
- ○ On most tasks and in most situations, I work co–operatively and collaboratively with others.
- ○ I can work co–operatively and collaboratively with others but prefer to work on my own.
- ○ I work best when working alone and sometimes find it challenging to work with others.
- ○ I believe functioning in a position of co–operation, collaboration or influence may currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as "not applicable") they think might be helpful so they can explore them with their employer.

☐ Define requirements and limitations for an acceptable working relationship and how employees will be held accountable for this type of behaviour.	☐ N/A
☐ Outline clear and measurable expectations for respect in the workplace for all employees.	☐ N/A
☐ Define how success will be measured – for example, no critical comments in team meetings, no outbursts, adjusted sales targets.	☐ N/A
☐ Provide all staff with training on building a socially supportive workplace.	☐ N/A
☐ Provide training for managers and supervisors to increase their capacity to model effective communication in the workplace.	☐ N/A
☐ Develop processes and strategies to deal effectively with conflict.	☐ N/A
☐ Provide open and honest feedback in the following ways:	☐ N/A
☐ Allow the option of not attending work–related social functions.	☐ N/A
☐ Consider resources that can help develop the ability to engage more effectively with others in the workplace. Some ideas can include:	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:



3

Job expectations

Work conditions

Exposure to distractions

Focusing on work effectively despite visual, auditory or other distractions.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ Little or no visual, auditory or other distractions.
- ○ Minor degree of distractions are present during some tasks or parts of the shift.
- ○ Moderate degree of distractions are present during some tasks or parts of the shift.
- ○ 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.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the "not applicable" box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I am able to work effectively with a high degree of distractions, including:
- ○ I am able to work effectively with a moderate degree of distractions, including:
- ○ I am able to work effectively with a minor degree of distractions, including:
- ○ I believe exposure to distractions will currently present a significant challenge for me. These distractions include:

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job. Employee to check and comment on any ideas that they would like to explore with their employer.

☐ Request for a quieter workspace with fewer distractions, specifically:	☐ N/A
☐ Permission to use headphones to listen to calming sounds or music.	☐ N/A
☐ Permission to wear earplugs to reduce noise distraction.	☐ N/A
☐ Exposure to natural lighting in the work area, such as special lighting or a window.	☐ N/A
☐ Permission to reduce clutter in the work area.	☐ N/A
☐ Minimize use of scents if this has been identified as a medical issue.	☐ N/A
☐ Modifications that reduce exposure to specific stimuli including:	☐ N/A
☐ Allow for some or all of the work to be done at home, if practical.	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Tolerance of stressful environments

Working effectively and calmly when personal or professional demands challenge available capabilities or resources.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ No exposure to stressful environments in the normal course of duties.
- ○ Infrequent exposure (up to monthly) to stressful environments in order to complete job requirements.
- ○ Occasional exposure (up to weekly) to stressful environments in order to complete job requirements.
- ○ Frequent exposure (up to daily) to stressful environments in order to complete job requirements.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the “not applicable” box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I am able to tolerate frequent exposure (up to daily) to stressful environments.
- ○ I am able to tolerate occasional exposure (up to weekly) to stressful environments.
- ○ I am able to tolerate infrequent exposure (up to monthly) to stressful environments.
- ○ I believe tolerating a stressful work environment will currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as "not applicable") they think might be helpful so they can explore them with their employer.

☐ The best way to provide instructions and feedback to me in a stressful environment is:	☐ N/A
☐ The following supports would help me to cope in a stressful environment:	☐ N/A
☐ Consider how to provide or increase support in stressful situations, specifically:	☐ N/A
☐ Provide genuine praise and positive reinforcement during the work week.	☐ N/A
☐ Allow reasonable time off to attend counselling sessions or medical appointments, specifically:	☐ N/A
☐ Provide supportive employment services or a work coach.	☐ N/A
☐ Allow more frequent breaks – for example, three 5–minute breaks rather than one 15–minute break.	☐ N/A
☐ Regularly bring team together for team building activities that focus on building resilience, emotional intelligence, civility and respect.	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Overlapping tasks

Effectively prioritizing, monitoring, and completing multiple tasks or functions on time.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ Not responsible for concurrent multiple tasks; only responsible for performing one task at a time until completion or further direction is provided by supervisor.
- ○ Some responsibility for multiple tasks, but very clear guidelines or cues abut when to perform each task.
- ○ Responsible for multiple tasks, with some time management skill and judgment required to determine priorities.
- ○ 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.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the "not applicable" box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I am able to perform a high number of tasks requiring time management skill and judgment to determine and make decisions about priorities.
- ○ I am able to perform a moderate number of tasks requiring time management skill and judgment to determine and make decisions about priorities.
- ○ I am able to perform more than one task but may require guidance to determine which tasks are a priority.
- ○ I believe performing more than one task at a time will currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as "not applicable") they think might be helpful so they can explore them with their employer.

☐ Modifications to workplace processes to focus on one task at a time, if practical.	☐ N/A
☐ Outline clear, specific and measurable expectations with all tasks.	☐ N/A
☐ Develop a list of all tasks and review with supervisor to help establish priorities.	☐ N/A
☐ Request training on time management skills.	☐ N/A
☐ Consider job–sharing arrangements.	☐ N/A
☐ Request the removal of any non–essential functions of the job, including:	☐ N/A
☐ Provide opportunities to improve efficiency on specific tasks, including:	☐ N/A
☐ Create a schedule that indicates the time required on tasks and review against the actual time spent.	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Degree of isolation

Working effectively without regular contact with others. This could include interacting primarily through technology or infrequent face–to–face get–togethers.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ No or rare interaction with supervisor or co–workers in the normal course of duties.
- ○ Infrequent (up to monthly) interaction with a supervisor or co–workers to complete job requirements.
- ○ Occasional (up to weekly) interaction with a supervisor or co–workers to complete job requirements.
- ○ Frequent (up to daily) interaction with a supervisor or co–workers to complete job requirements.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the “not applicable” box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

- ○ I work best with frequent interaction with my supervisor or co–workers.
- ○ I work best with occasional interaction with my supervisor or co–workers.
- ○ I work best with infrequent interaction with my supervisor or co–workers.
- ○ I believe frequent interaction with my supervisor or co–workers will currently present a significant challenge for me.

Employee comments on how their current ability might impact their job:

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as “not applicable”) they think might be helpful so they can explore them with their employer.

☐ Provide the opportunity to interact with other team members via online technology more frequently than in the past. The reason for this is:	☐ N/A
☐ Consider regular team–building activities with work groups, either through online webinars or live meetings: ☐ Annually ☐ Monthly ☐ Weekly	☐ N/A
☐ Consider bringing remote team members together in a single location for meetings/events: ☐ Annually ☐ Monthly ☐ Weekly	☐ N/A
☐ Provide regular positive feedback acknowledging contributions and value.	☐ N/A
☐ As a perk or bonus, provide memberships that would allow more social interaction related to work and/or wellbeing, including:	☐ N/A
☐ Allow regular time in the workweek to attend business, volunteer and/ or social functions that provide social interaction such as networking and wellbeing. These might include:	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:



4

Job expectations

Physical demands

Work endurance

Effectively performing all work tasks without undue fatigue including while on regular, rotating, overnight or on–call shifts.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one in each of the three categories:

Intensity

- ○ Work demands are consistently at a reasonable and steady pace.
- ○ Work demands become more intense 2 – 3 times a year for no more than 2 weeks at a time.
- ○ Work demands become more intense on a monthly basis for no more than a couple of days at a time.
- ○ Work demands are consistently intense.

Breaks

- ○ Regular breaks are mandatory.
- ○ Break times are provided but employee may choose to use them or not.
- ○ Break times are taken around work demands.
- ○ Employee may occasionally be expected to work for longer periods without breaks.
- ○ Employee may frequently be expected to skip break time due to the nature of the work, for example surgery.

Shift work and overtime

- ○ The job requires the regular work times each day without overtime.
- ○ The job requires the ability to work overtime.
- ○ The job requires rotating, irregular or on–call shifts without overtime.
- ○ The job requires rotating, irregular or on–call shifts with overtime.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the “not applicable” box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one in each of the three categories:

Intensity

- ○ I am able to keep up with the work pace and intensity even during busy times.
- ○ I am able to keep up with the work pace and intensity most of the time.
- ○ I find the work pace and intensity challenging during busy times.
- ○ I often have difficulty keeping up with the work pace and intensity.

This is because:

Breaks

- ○ I am able to use break times to restore my energy.
- ○ I frequently choose to work through my breaks regardless of my energy level.
- ○ I am occasionally unable to take my breaks due to work demands.
- ○ I am frequently unable to take my breaks due to work demands.

This is because:

Shift work and overtime

- ○ I have no problem fulfilling all scheduled, overtime or on–call hours that may be required.
- ○ I believe I can fulfil my current scheduled working hours but may have difficulty working overtime or on–call.
- ○ I believe my current scheduled working hours could present a significant challenge for me.

This is because:

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as "not applicable") they think might be helpful so they can explore them with their employer.

☐ Review all work tasks with supervisor to determine which are priorities and which can be modified to improve and support endurance.	☐ N/A
☐ 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.	☐ N/A
☐ Not scheduling the employee for consecutive shifts where longer periods without breaks will be required.	☐ N/A
☐ Not scheduling the employee for consecutive overtime shifts.	☐ N/A
☐ Balancing evening/ overnight shifts with other shifts.	☐ N/A
☐ Removing the employee from the after–hours on–call list.	☐ N/A
☐ When possible, allowing for more frequent short breaks to restore energy and focus – for example, 5 minutes every hour.	☐ N/A
☐ Regularly check in with the employee during periods when breaks are not possible or during overtime shifts.	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Physical job requirements

Safely and effectively meeting the physical demands of the job without strain, injury or illness.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Check one:

- ○ No physical demands in the normal course of duties.
- ○ Occasional exposure (up to weekly) to physically demanding work situations in which assistance is available immediately.
- ○ Occasional exposure (up to weekly) to physically demanding work situations in which assistance is not available immediately.
- ○ Frequent exposure (up to daily) to physically demanding work situations in which assistance may or may not be available.

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the “not applicable” box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Check one:

○ I am able to do all tasks to fulfill the usual physical demands of the job.

○ I am able to meet the physical demands of the job if the following physical limitations can be accommodated. Please check any that apply and explain in detail on the space given below.

☐ Visual

☐ Auditory

☐ Upper body mobility or strength

☐ Lower body mobility or strength

☐ Fine motor skills

☐ Hand/eye coordination

☐ Other

○ I believe fulfilling the physical demands of the job will currently present a significant challenge for me.

Employee comments on how their current ability might impact their physical job demands:

Potential solutions to support employee success on the job. Employee to check and comment on any ideas that they would like to explore with their employer.

☐ Consult with an ergonomist to ensure best practice.	☐ N/A
☐ Provide the following supports to accommodate physical limitations:	☐ N/A
☐ Allow for short breaks to restore energy and focus – for example, 5 minutes every hour.	☐ N/A
☐ 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.	☐ N/A
☐ Provide appropriate workplace safety training that recognizes and supports the employee's physical abilities in the following areas:	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:



5

Job expectations

Other

Other job expectations

Add your own job expectation in this blank template. This is where you can add unique expectations including job–related travel, public speaking or dealing with media, exposure to traumatic situations, work–related grief and loss, dealing with patients, clients, children or volunteers, extreme levels of responsibility for privacy, safety, security, or finances, or anything specific to the role. Although most can be dealt with in the existing expectations, focusing on those that are unique in some way may help identify relevant solutions.

☐ **Employee is meeting or exceeding this expectation. Nothing further is required.**

Employer assessment of current job expectations

Describe in detail why this level of expectation is important to the success of this job:

Remember to check the "not applicable" box for any potential solution which is not possible or practical ***before*** you ask the employee to complete their section. You may also add any ideas not shown. This helps the employee to focus on solutions that are possible in their job role.

Employee assessment of current abilities

Employee comments on how their current ability might impact their job:

Potential solutions to support employee success on the job

Potential solutions are offered to support success on the job. Employee to review and comment on any ideas (except those checked as “not applicable”) they think might be helpful so they can explore them with their employer.

☐	☐ N/A
☐	☐ N/A
☐	☐ N/A
☐	☐ N/A
☐	☐ N/A

Any other recommendations to support employee success in meeting this job expectation:

Supporting success conversation

This conversation happens once the job expectations are clear, and the employee is at work or ready to return to work. The employer and employee work together to develop the plan that supports the employee's success.
Review the process for developing an effective work plan, including the supporting success conversation guide at **clwsmh.com/resources/developing–employee–plans–for–leaders**. The ultimate goal is to develop a plan that supports job success while maintaining well–being.

Question 1: What will allow you to be successful at your job and still have energy at the end of the day?

Question 2: What will you commit to that will help you successfully manage your work and maintain your well–being?

Question 3: Are there current tasks you would like additional training or re–training on?

Question 4: How can feedback be provided to you in a positive and constructive way?

Question 5: How often would you like to receive feedback that recognizes your contribution?

Question 6: How should future issues be managed in a way that is positive and healthy for you?

Question 7: What else might you need from me or the organization to support your success at work?

Question 8: When and how often should we re–visit this agreement to make adjustments?

Additional resources

Responding to co–worker questions

When returning to work after a leave, employees have different levels of comfort in sharing their personal information. Co–workers will likely ask questions about why they were away, their current health status, or why they may be doing things differently at work. Responses are offered that might be helpful in preparing to respond.



This resource is available for free download from **clwsmh.com**.

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