

# Return to Work Checklist (HR)

## Pre-Return Planning & Communication

Tasks related to communication, documentation, and preparation before the employee's return.

### Anticipated Return Date

### Reason for Absence (brief summary)

### Communication Method Preference

- Email
- Phone
- Video Conference

### Contact Person for Return-Related Questions

### Date of Last Communication with Employee

Enter date...

### Summary of Pre-Return Communication

Write something...

## Medical/Legal Documentation Review

Ensuring necessary documentation (fit notes, legal releases) is received and reviewed.

### Date of Medical Clearance/Fit Note Received

Enter date...

### Upload Medical Clearance/Fit Note

 Upload File

### Type of Medical Documentation Received

- Fit Note
- Medical Certificate
- Doctor's Letter
- Other

### Summary of Medical Professional's Recommendations (if any)

Write something...

### Legal Documentation Received (if applicable)

- Release of Information
- Settlement Agreement
- Other Legal Document
- None

### Upload Legal Documentation (if applicable)

 Upload File

### Notes on Legal Documentation Review

Write something...

## Workplace Adjustments & Accommodations

Confirming any workplace changes or accommodations are implemented.

### Reason for Accommodation (if applicable)

- Medical Condition
- Disability
- Other
- Not Applicable

### Detailed Description of Accommodation Required

Write something...

### Adjusted Work Hours (if applicable)

Enter a number...

### Date Accommodation Implemented

Enter date...

### Type of Workplace Adjustment

- Ergonomic Equipment
- Modified Workspace
- Flexible Schedule
- Assistive Technology
- Other

### Supporting Documentation (e.g., medical note)

 Upload File

## Job Role & Responsibilities Confirmation

Verifying the employee understands their role and any changes to their responsibilities.

## Summary of Job Responsibilities

Write something...

## Reporting Structure Confirmation

- Direct Supervisor
- Department Head
- Cross-Functional Team

## Key Performance Indicators (KPIs) - Target Value

Enter a number...

## Date of Last Performance Review

Enter date...

## Core Competencies Revisited

- Communication
- Teamwork
- Problem-Solving
- Leadership

## Confirmation of Role Changes (if any)

Write something...

# Training & Updates

Ensuring the employee is updated on any new policies, procedures, or training requirements.

### Date of Last Training Completion

Enter date...


### Training Modules Required (Select all that apply)

- Policy Updates
- Safety Procedures
- Harassment Prevention
- Data Privacy
- Performance Management

### Summary of Key Training Updates Discussed

Write something...

### Proof of Training Completion (e.g., Certificate)

 Upload File

### Training Delivery Method

- Online Module
- Instructor-Led Session
- Hybrid (Online & Instructor)

### Training Module Duration (minutes)

Enter a number...

## Performance Expectations & Goals

Reiterating performance expectations and setting achievable goals.

### Summary of Key Performance Expectations

Write something...

### Quantitative Goal 1 (e.g., Sales Target)

Enter a number...

### Quantitative Goal 2 (e.g., Project Completion Rate)

Enter a number...

### Performance Metric 1 Weighting (e.g., 1-5 scale)

- 1 - Low Importance
- 2 - Moderate Importance
- 3 - Average Importance
- 4 - High Importance
- 5 - Critical Importance

### Goal Review Date

Enter date...

### Specific Actions Needed for Improvement (if applicable)

Write something...

## Ongoing Support & Monitoring

Establishing a plan for ongoing support and monitoring the employee's progress.

### Follow-up Meeting Scheduled Date

Enter date...

### Scheduled Check-in Time

### Frequency of Check-ins (e.g., weekly, bi-weekly)

Enter a number...

### Check-in Method (e.g., 1:1, Team Meeting, Email)

- 1:1 Meeting
- Team Meeting
- Email
- Phone Call

## Notes from Check-in Meeting

Write something...

## Employee Satisfaction Level (after check-in)

- Very Satisfied
- Satisfied
- Neutral
- Dissatisfied
- Very Dissatisfied

# Confidentiality and Data Security

Reviewing confidentiality obligations and data security protocols.

## Employee Acknowledgement of Confidentiality Agreement

Write something...

## Summary of Confidential Information Access Restrictions

Write something...

## Data Handling Protocol Adherence

- Fully Compliant
- Partially Compliant
- Non-Compliant

**Types of Confidential Data Accessed (Select all that apply)**

- Personal Identifiable Information (PII)
- Financial Records
- Medical Information
- Proprietary Business Data

**Date of Confidentiality Training Completion**

Enter date...

**Employee Signature Acknowledging Data Security Responsibilities**

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