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TALKING TO YOUR EMPLOYEE — A CHECKLIST

The following activities will help you prepare for a meeting with your employee to talk about accommodations.

PREPARING FOR THE MEETING

- Review employee's personnel file.
- Learn about the employee's performance history.
- Read performance reviews.
- Inquire with former supervisors, if applicable.
- Review employee's job description and tasks.
- Know your company's accommodation policies and processes.
- Be familiar with applicable legislation, if appropriate.
- Know your company's confidentiality policy.
- Know what resources are available to your employee:
 - EAP
 - union delegate
 - community resources
- Write down your concerns about the employee's performance in point form.

SCHEDULING THE MEETING

- Consider your schedule. Ensure you have enough time to prepare. Find a time when you will have a full hour to devote to the discussion with your employee.
- Inquire about your employee's schedule. Assist your employee to find an appropriate time for the meeting (e.g., not before an important presentation).
- Remain neutral through all your discussions about setting the meeting. Do not hint or imply that there is a problem.

CREATING A CALM SETTING

- Find a quiet, private space to meet where co-workers cannot observe or overhear.
- Forward your phone.
- Have drinking water and tissues handy.
- Have all your documentation prepared, with copies if necessary.
- Do some relaxation exercises, if necessary, to present a calm, professional manner.
- Review the suggestions below for appropriate wording.
- Provide pen and paper for your employee. Encourage the employee to make notes.



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DURING THE MEETING

- ❑ Describe the purpose and structure of the meeting.
- ❑ Use "I" statements to describe performance issues.
 - "I've noticed that..."
 - "I'm concerned about..."
 - "I'm wondering about..."
 - "I'd like to see you get back on track."
- ❑ Use open-ended questions to encourage the employee to talk.
 - "Is there anything you can think of to help you get back on track?"
 - "Is there anything I can do to help you?"
- ❑ Set specific performance goals.
- ❑ Schedule a follow-up meeting.

IF YOUR EMPLOYEE DISCLOSES A MENTAL ILLNESS, A PHYSICAL ILLNESS, OR A PERSONAL SITUATION

- ❑ Stay calm. Listen, listen, listen. Consider that this is harder for your employee than it is for you.
- ❑ Stick to performance goals.
- ❑ Offer information about resources.
- ❑ Consider thanking your employee for sharing.

FOLLOWING THE MEETING

- ❑ Write up your notes and place them in the employee's personnel file.
- ❑ Follow up on any actions that require your input.
- ❑ Treat your employee with professional respect and courtesy.

Do:

- ❑ Listen with an open mind.
- ❑ Remain calm and professional.
- ❑ Offer to discuss accommodation.
- ❑ Look for creative solutions.
- ❑ Describe rather than accuse.
- ❑ Use "I" statements.
- ❑ Look for strengths.
- ❑ Stick to performance issues.

DON'T:

- ❑ Make promises that you cannot keep.
- ❑ Demand a diagnosis or discussion of one.
- ❑ Pretend to understand if you do not.
- ❑ Discuss personality issues.