



TOOLKIT

MANAGING WORKPLACE ATTENDANCE

Our toolkit has been designed to guide you towards best practices and support you in implementing concrete actions in workplace attendance management.



Leave of absence



In return-to-work process



Presenteeism



Healthy and performing



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LIST OF AVAILABLE TOOLS

- Tool N° 1** [Managing disability insurance cases](#)
- Tool N° 2** [Roles and responsibilities of the actors involved in disability insurance](#)
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- Tool N° 9** [Implementation of a health promotion program](#)
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*Note that we can provide different customizable tools like guides and flyers. Contact us.



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MANAGING DISABILITY INSURANCE CASES

Disability insurance case management can quickly become complex and time consuming. Fortunately, we know that certain actions can facilitate this process or at least minimize the impact of a problematic issue. The following recommendations provide a basis for all contexts. They serve as a starting point to customize your approach.

CHECKLIST FOR THE POLICYHOLDER

At the employee's request and/or upon receipt of a leave of absence certificate qualifying for the disability insurance plan, we recommend the following 3 steps:

1

Apply for disability insurance (administrative component)

- Complete the plan administrator's statement
- Provide the necessary information to the employee regarding the claims process

2

Identify support measures and communicate these to employee

3

Maintain contact with the absent employee

The following pages show you the steps in detail.

Remember that we are available to assist you in managing workplace attendance and in the event of more complex claims or those requiring special attention.



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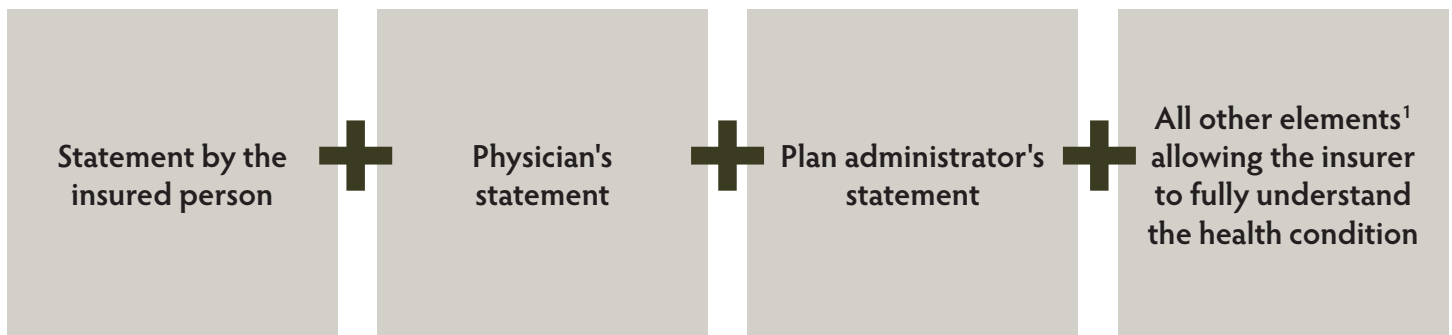
1 Apply for disability insurance (administrative component)

A) Complete the plan administrator's statement expeditiously to reduce delays in insurer processing time

It is important that the insurer has an up-to-date job description. You can also send the entire medical record compiled by the employer since the start of the disability including all medical assessments, if applicable. You may be required to provide certain additional information to the insurer such as absence history, conflict situation prior to the leave, change in behaviour, etc. The goal is to allow the insurer to make a fair and equitable decision under the terms of the contract. This information may also be useful in identifying barriers to returning to work.

B) Transmit the necessary information to the employee

In order for the claim to be reviewed, the insurer must receive the following information:



It takes approximately 5 to 10 working days following receipt of the documents to review the claim. The process can be delayed by several weeks if the claim requires additional information, hence the importance of completing the claim forms properly.

The information you provide to the employee regarding the claims process will be essential to its smooth conduct. It is important that they know that they are responsible for providing the necessary documents. They must also know that the more the documents reflect their health status and allow the insurer to understand what prevents them from doing their job or any remunerative work, the more just and fair the decision will be.

Remember that the insurer will only have what is sent to it to guide its review and make its decision.

¹ All other elements: medical examinations, progress notes, etc.



2 Identify support measures offered in your organization and communicate these to the employee

The choice of a support measure must take into account the organization's context and be available in a way that is fair to employees. The following diagram shows examples of measures aimed at maintaining employment or promoting a return to work.

You can refer to the *Support Measures* tool for more details and for a more exhaustive list of examples.

Work scheduling measures

- Gradual return to work
- On-the-job internship
- Reduced weeks
- Flexible hours

Professional development measures

- Upgrading knowledge
- Training

Measures affecting work organization

- Temporary assignment/light duties
- Possibility of occupying a new position temporarily or permanently depending on availability
- Remote working

Other measures

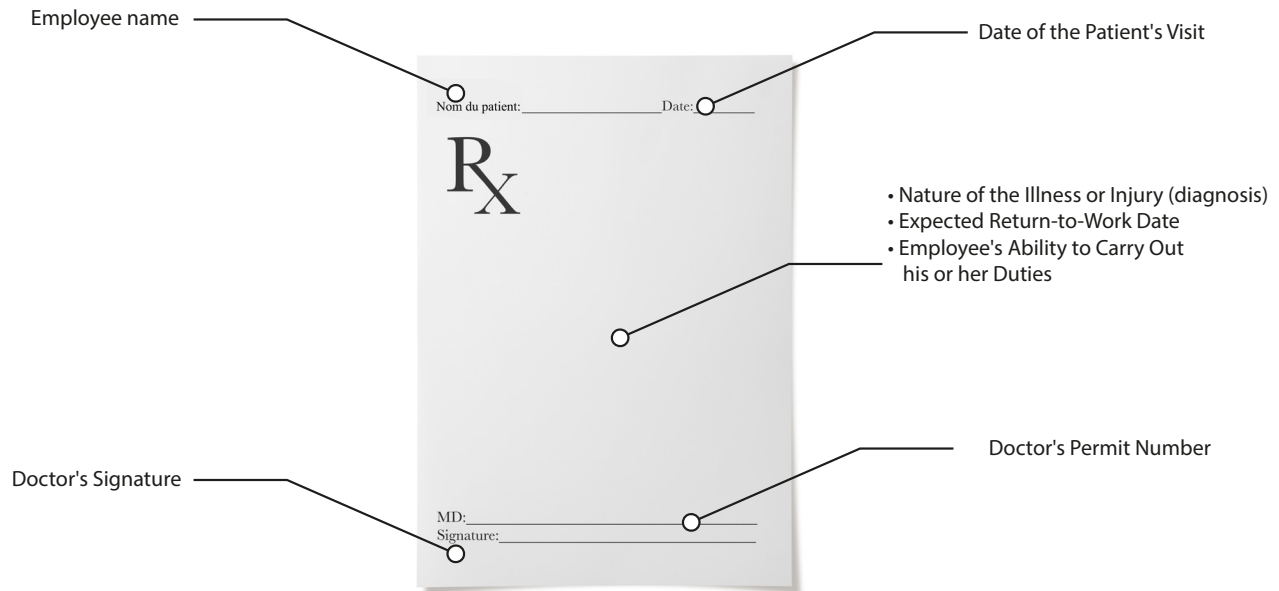
- Workstation layout
- Possibility of offering a means of transport (taxi, carpooling)
- Employee assistance program or healthcare professional insurance coverage
- Rehabilitation program offered by the insurer²

² Although it is not an obligation of the insurer to pay for the rehabilitation, it could see it as an asset to facilitate return-to-work.



3 Maintain contact with the absent employee

As an employer, it is important to obtain the medical certificates at reasonable intervals³. For a medical certificate to be complete, the following information should be included:



This medical information allow to assess the possibility of reintegration, to offer support to the employee, to help in the good management of the organization's resources and planning the work.

In addition to receiving medical certificates, it is strongly recommended to maintain contact with the employee throughout the leave of absence. This approach allows to inform the employee of the support measures available, to promote effective communication and thus prepare for a smooth return to work. This action should not be seen as a way of putting pressure on the employee to return to work more quickly. On the contrary, adequate contact will reduce the feeling of guilt or fear of being judged and will help to enhance your relationship of mutual trust.

This contact should ideally be made by the employee's supervisor or manager, but depending on the structure and organization context, the person responsible may vary. If this practice is implemented in your organization, the employee should be informed at the start of their leave of absence.

You will find tips and pitfalls to avoid on the next page.

³ This interval may vary depending on the individual's health condition.

SOME RECOMMENDATIONS FOR A SUCCESSFUL CONTACT

- ✓ Do not communicate with the employee if trust is broken
- ✓ Protect confidentiality and do not pass on information about their health condition to colleagues or to any other person
- ✓ Make them feel that they still have their position without putting pressure for a return to work
- ✓ Do not give the impression that you are in a hurry to hang up
- ✓ Avoid sentences like, "What you are going through must be horrible."
- ✓ Do not give personal advice like, "I've been through the same thing, here's what you should do..."
- ✓ Approach the discussion in different ways, such as, "How are you doing at the moment? We're thinking of you here." or "Your colleagues are asking me about you, what would you like me to tell them?"



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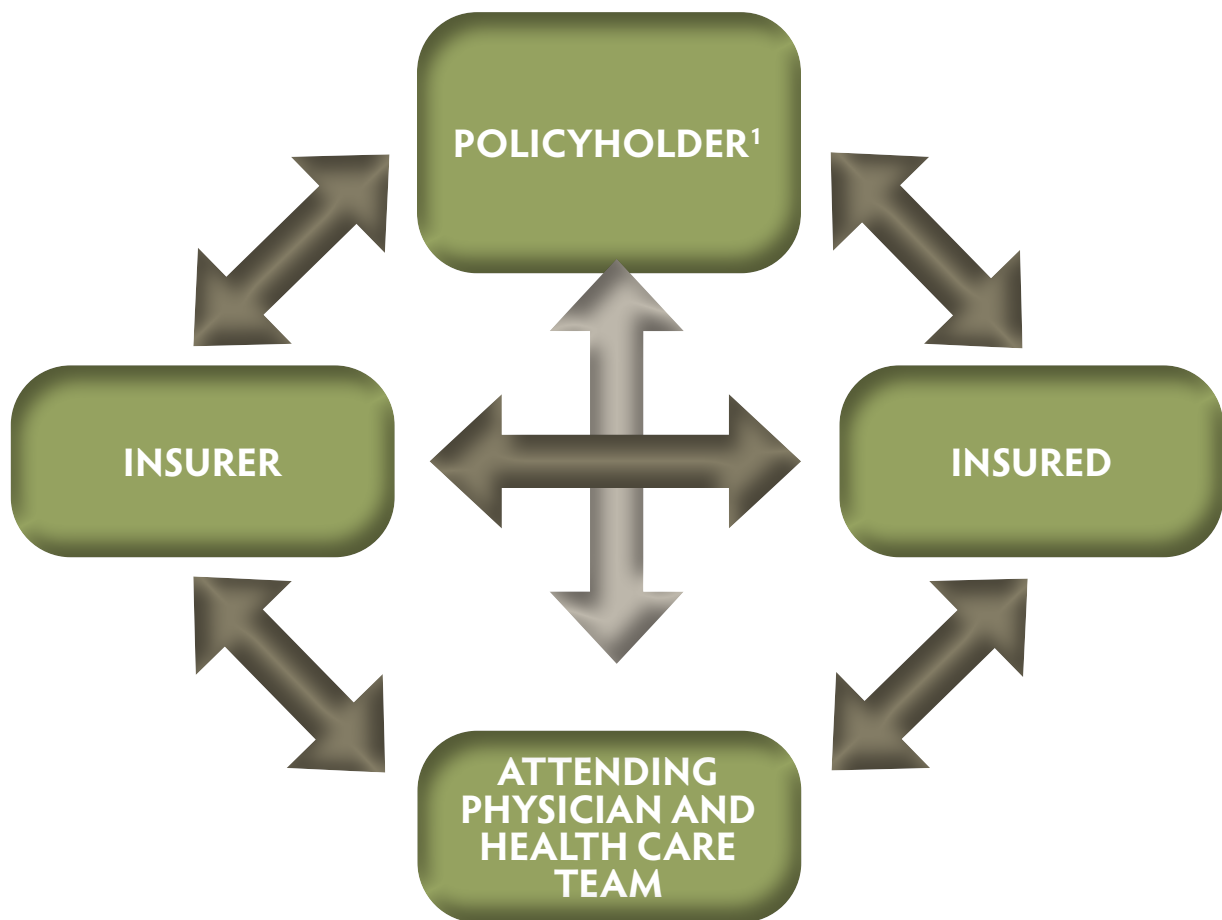
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ROLES AND RESPONSIBILITIES OF THE ACTORS INVOLVED IN DISABILITY INSURANCE

One of the main reasons for the complexity of some disability insurance applications concerns the great number of people involved in the process. Each of them has their own role and responsibilities. Respecting these is critical to the success of the claims process. This document therefore aims to present the relationship that exists between the main actors involved.

You will find detailed information on the next page.



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¹ Refers to the company or group, such as an employer or a union, whose name is entered on the group insurance policy.



Insured

- Ensure that the initial application is complete
- Provide medical evidence on an ongoing basis upon request
- Follow appropriate treatment recommendations
- Cooperate and be available for discussions with the representative handling the claim
- Maintain contact with the workplace
- Participate in return-to-work planning and recommended rehabilitation programs
- Contact the insurer and the employer's representative when a return to work or accommodation is indicated

Health Care Team

- Make the accurate diagnosis
- Establish and implement an optimal treatment plan, foster patient engagement
- Provide the insurer with the required medical information upon request
- Do not give opinions or draw conclusions about disability eligibility, but provide understanding and evidence to support medical restrictions to avert any possible damage or functional limitation
- Cooperate with other health care providers and the insurer to facilitate a safe and timely return to work

Policyholder

- Transmit the necessary information to the insured concerning the disability insurance coverage
- Maintain contact with the insured and keep them informed of what is happening in the workplace
- Create, maintain and support a healthy workplace
- Assist with return-to-work planning
- Assist with any disputes that may arise regarding eligibility for disability benefits

Insurer

- Ensure eligibility and review your diagnosis, treatment, limitations and compare this with the definition of total disability.
- Provide adequate notice before the payment is terminated or the disability benefit file is closed.
- Answer the insured's questions about their claim as well as the process
- Work with the insured, the employer, the union and the health care team to develop the return-to-work plan



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INFLUENCE OF THE ACTORS INVOLVED IN THE RECOVERY PROCESS

In the context of disability, several situations can influence the recovery process. This document presents a summary of the factors that can affect the duration of the leave of absence. These factors have been associated with the different actors involved in the leave of absence for ease of reference.

As an employer or plan administrator, you will certainly not be able to control each of the aspects listed below. However, this information can help you understand the claim and guide certain actions. You can use this list to appraise the needs for interventions. In fact, if the situation corresponds to one of the points mentioned below, actions may be needed to facilitate a return to work.

The individual and their environment

- ✓ Presence of a comorbidity¹
- ✓ Negative beliefs such as: pain means damage
- ✓ Catastrophizing in connection with their condition: I will never be able to...
- ✓ Passive attitude, decreased activity, prolonged rest
- ✓ History of absences from work/relapses
- ✓ Negative perception of the organization's OHS practices
- ✓ High demand/low autonomy²
- ✓ Fears about returning to work
- ✓ Work is insignificant and unrewarding in the mind of the employee
- ✓ Significant parental responsibilities
- ✓ Lack of a good support network and loss of contact with colleagues and friends
- ✓ Secondary gains during leave of absence (financial, loss of responsibilities, strong recognition from the social or family network towards the situation)

¹Association of two illnesses, mental or physical, frequently observed in the population (without established causality, unlike complications).

²High demands at work, combined with low autonomy, increase the risk of psychological distress.



Insurer

- ✓ Dispute/refusal/investigations
- ✓ Lack of understanding of the insurer's role
- ✓ Communication problem and trust issues

Health professionals

- ✓ Diagnosis is unclear and not understood by the patient (plain language)
- ✓ Treatment plan not communicated to patient (explanation of treatment, setting realistic expectations, patient involvement)
- ✓ Unclear prognosis (it is important to have an action plan, including targets, as soon as possible)
- ✓ Multiple changes to the treatment plan
- ✓ Treatment outside the standards established in the reference guides
- ✓ Working in silos and without concerted action³

Employer

- ✓ Loss of contact with the absent worker
- ✓ Lack of support measures offered to the employee
- ✓ Toxic workplace
- ✓ Disciplinary action before the leave or conflict with a colleague
- ✓ CNESST dispute/challenge

Although each situation is unique, it is recognized that the chances of returning to work are inversely proportional to the duration of the leave of absence and that a case risks becoming chronic around the 12th week of leave. Early intervention and returning to work as soon as possible can prevent many complications for the employee and the organization, and even facilitate recovery.

Remember that we are available to assist you in managing workplace attendance and in the context of complex disability claims.

³ No cooperation between professionals.





SUPPORT MEASURES

What is a support measure?

Any measures offered on a temporary¹ or permanent basis aimed at supporting a person going through a difficult situation or who has a health problem. These measures are offered as a preventive measure or to facilitate a return to work. They can also include all measures that promote productivity and well-being in the workplace.

Support measures available in an organization, among other things, are conducive to the attraction, mobilization and retention of employees. Don't underestimate the importance of showcasing them.

Success factors for choosing and using a support measure:

- ✓ Choose measures that take into account the context and needs of the organization
- ✓ Offer and apply measures in a just and fair manner for employees
- ✓ Effectively communicate the measures offered in the organization
- ✓ Ensure that managers have the information they need to offer them and do a follow-up
- ✓ Avoid creating precedents
- ✓ Be clear and precise in acceptance of a support measure
 - ✓ Define the suggested measure
 - ✓ If applicable, specify the duration of the measure (start and end)

The following page shows examples of support measures aimed at improving well-being at work, maintaining employment or facilitating a return to work. Do not hesitate to use it as a model to decide on the measures you want to offer in your organization. We strongly recommend that you list them in writing in the same document to get a global overview of your offer and to make it easier to use.

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¹ If the situation is temporary, the time period should be specified.



EXAMPLES OF SUPPORT MEASURES

Health and Lifestyle

- Group insurance plan (disability insurance, health coverage, including the services of health professionals, etc.)
- Assistance programs (employees, managers)
- Health programs/activities/challenges
- Rehabilitation programs offered by the insurer²

Work Environment

- Workstation layout
- Health-driven cafeteria, a space that promotes cooked meals and exchange among colleagues
- Access to a shower, sports activities
- Rest areas
- Programs to manage noise, air quality, temperature

Management practices

- Gradual return to work
- Temporary assignment/light duties
- Manager training
- Professional development measures
- Maintaining contact with the absent employee
- Recognition and team cohesion activity
- Policies/procedures promoting workplace attendance

Work-life balance

- Flexible work schedule, shared schedule, compressed work week
- Remote working
- Leave for personal or family obligations and authorized absences for consultations
- Telemedicine
- Compassionate care benefits provided by employment insurance
- Variety of services offered in the workplace

Questions to Ask Yourself to Optimize the Use of Support Measures

1. What are our organization's support measures?
2. Do we have too many, just enough or not enough?
3. Do they meet the organization's needs?
4. Are they disseminated and understood?

Several tools and measures may also be available through your insurer and the government. Do not hesitate to include them in your assessment and to use and disseminate them. Do not assume people are already aware of the options available to them.

² Some insurers may offer rehabilitation programs through internal resources or external rehabilitation resources. Although the insurer is not obliged to pay for the rehabilitation, it could see it as an asset in facilitating a return to work.





MANAGING RETURN-TO-WORK

Managing return-to-work is a key step in the disability process. Evidence shows that in most cases of absence, returning to work, as soon as it is safe to do so, helps support recovery and reduces the risk of chronicization of the condition. People generally feel better when their normal daily routine resumes. This period also presents great opportunities to clarify the employee's expectations. It is not uncommon for employees to return with a stronger foundation for the future. However, a relapse can have devastating consequences. It is therefore a crucial step that requires our attention.

This document will cover the main stages of a return to work to guide you in your interventions.



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1 Planning a return to work

There are various return-to-work options that can be offered to the employee, such as:

- Gradual return to work over time and/or to the task
- Temporary assignment, light duties or permanent reassignment
- Supernumerary or observation period
- Training period
- Return to full-time work

The different return-to-work options do not apply to all situations.

The terms of the return will depend on several factors, such as:

- ✓ Duration of the leave of absence
- ✓ Type of position
- ✓ Employee's seniority
- ✓ Possible residual symptoms
- ✓ Organization's flexibility

Note that, depending on the type of return, additional support or accommodation measures may apply.

Here is a list of the relevant information to obtain before a return to work¹:

- ✓ Return-to-work date
- ✓ Information on capacities, limitations and restrictions (work schedule and duration of return plan if applicable)
- ✓ Return-to-work schedule
- ✓ Adjustment or accommodation measures (if necessary)
- ✓ Identification of training needs, (if necessary)
- ✓ Job description and clarification of roles and responsibilities
- ✓ Timelines for follow-ups

¹ It is not recommended to start a return to work before having agreed on its terms. In fact, it is better to reassess along the way rather than start without having agreed on a plan.



2 Welcome

Don't underestimate the anxiety and sense of vulnerability that a return to work can generate for an employee. It's not just another day for them and it is probably the most important step in the return-to-work process. The welcome and support of the superior and colleagues remains crucial. The first day sets the stage for relapse prevention.

On the first day of returning to work, make sure:

- ✓ to welcome the employee as agreed during the preparatory meeting or the discussion
- ✓ to review the first day with the employee at the end of the day
- ✓ to offer a welcome without judgement

Preparatory meeting

Prior to the return, it is strongly recommended to hold a preparatory meeting with the employee to discuss mutual expectations, changes that have occurred in the organization and to secure a mutual commitment so that the return to work is sustainable.

During this meeting, you can take the opportunity to discuss the employee's apprehensions, ask how they would like to be welcomed by their colleagues and communicate it to the latter afterwards.

People are often uncomfortable after an absence, especially if it was long term.

3 Follow-up

This last step makes it possible to conclude a return to work and to ensure the employee's continued employment. It is recommended that you schedule regular meetings with the employee to ensure a smooth return and make adjustments, if necessary. The follow-up interval is specific to each situation, but it is crucial that the scheduled meetings take place, not be moved, and especially not forgotten. Don't neglect to follow up, even if you think everything is going well.

You can refer to the *Identification of Warning Signs* tool to reduce the chances of relapse.

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IDENTIFICATION OF WARNING SIGNS

Some disabilities develop over a long period of time. Members of an organization often witness warning signs. This document provides you with an overview of the various signs that can be observed in an employee. Although not exhaustive, this list can help you to:

- Identify an employee in a situation of presenteeism or at risk of disability
- Complete the plan administrator's statement form (relevant information to be submitted)
- Follow up in the context of a return to work

Remember that by properly identifying those at risk, you have the ability to offer support measures and perhaps prevent the situation from worsening. The positive impacts of early intervention have been well demonstrated in workplace attendance management.



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EXAMPLES OF WARNING SIGNS OF DISABILITY

Cognitive changes

- Frequent and repeated forgetfulness
- Mistakes
- Poor concentration
- Difficulties in making decisions

Psychological changes

- Isolation
- Mood swings, impatience, aggressiveness
- Sadness
- Apathy, disinterest, disengagement
- Decreased self-esteem and/or self-confidence
- Sudden changes in behaviour

Physical changes

- Neglected appearance
- Fatigue, sleep disorders
- Repeated infections
- Weight loss or gain
- Muscle pain, back pain, migraines
- Heart palpitations

Poor organizational skills

- Conflicts among work teams
- Lack of cooperation
- Sudden drop in attendance and increased use of sick leave
- Increase in delays
- Increase in customer complaints or production quality
- Unusual deterioration in job performance

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DUTY TO ACCOMMODATE

The duty of reasonable accommodation is a means used to put an end to a discriminatory situation based on disability, religion, age or any other grounds prohibited by the *Charter of Human Rights and Freedoms*¹.

In matters of managing workplace attendance, the employer may have a duty to reasonably accommodate an employee with a disability, that is, a disadvantage that physically, mentally or psychologically limits the individual.

Accommodation may mean the employer's obligation to adjust the employee's workstation to meet their limitations or to evaluate other available positions within the company to which they could be reassigned.

The purpose of reasonable accommodation is to guarantee the exercise of the right to equality. Employers and service providers are therefore forced to actively seek a solution that allows an employee to fully exercise their rights.



¹ Website of the *Commission des droits de la personne et des droits de la jeunesse*.



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However, this obligation has a limit: undue hardship.

Undue hardship is understood to mean **“the limit beyond which an employer has no obligation to accommodate if this results in extreme hardship²”**.

Indeed, an employer is not required to create a tailor-made or unproductive position to accommodate an employee. Adjusting the position and eliminating certain tasks must not concern the main tasks or those essential to the position, since this would be tantamount to forcing the employer to create a new position.

The hardship may be considered excessive in cases where the accommodation creates, in particular:

- An expense that is difficult for the company to absorb;
- An undue impediment to the proper functioning of the organization;
- A serious breach to the safety and rights of others;
- Prejudice to the rights of other employees³.

In the event of undue hardship, the employer must produce evidence based on factors of health, safety, cost, impact on the rights of others and its impact on the smooth running of an organization or business. While complaints from other employees are not sufficient grounds to reject a possibility of acceptable accommodation, an accommodation that jeopardizes the right to equality, including gender equality, is considered unreasonable. An employee may also not claim, as an accommodation, a position that is already filled by another employee.

In evaluating accommodation options, it is important to consider the employee's preferences, but the responsibility for choosing the appropriate accommodation lies with the employer, not the employee. The employer has the right to run a productive workplace and to minimize disruption for other parties.

² A Guide for Managing the Return to Work by the *Canadian Human Rights Commission*.

³ Website of the *Commission des droits de la personne et des droits de la jeunesse*.



Here are the main steps in processing an accommodation request based on a virtual support guide offered by the *Commission des droits de la personne et des droits de la jeunesse*.

1 Receipt of the Request

1. Meet with the person requesting an accommodation.
2. Collect relevant information.
3. Commit to responding to the request within a reasonable time frame.

2 Review of the Request

1. Make sure it is a request for accommodation.
2. Do your research.
3. Process the request objectively.

3 Joint Search for Solutions

1. Involve the applicant in the search for solutions.
2. Be innovative and creative.
3. Apply the criteria for assessing undue hardship with good judgement.

4 Decision-making and Communication

1. Choose the most appropriate solution.
2. Explain your decision.
3. Put the terms of the agreement in writing.

5 Implementation of the accommodation and follow-up

1. Make sure that the applicant actually benefits from the accommodation granted.
2. Where necessary, adjust the accommodation measure granted.
3. Be proactive.

Four basic rules for accommodation:

- The duty to accommodate lies first and foremost with the decision-maker.
- The decision-maker has an obligation of means and not of results.
- Every request for accommodation is dealt with individually.
- The duty to accommodate rests primarily with the decision-maker, but the parties must work together to find a solution.

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EMPLOYMENT RELATIONSHIP IN A CONTEXT OF LONG-TERM DISABILITY

Your employee has been absent for over two years and, according to the latest information obtained, their health condition is irreversible. You wish to terminate the employment relationship, but do you have the right to do so? You are not alone in asking yourself this question. Unfortunately, the answer is not simple and depends on several factors.

This tool aims to provide you with the information necessary to understand the issues related to severing the employment relationship and help you make the best possible decision.

What the Law Says

- ✓ Section 79.1 of the *Act respecting labour standards (ARLS)* mentions that an employee may be absent from work for a period of not more than 26 weeks over a period of 12 months, owing to sickness, an organ or tissue donation for transplant, an accident, domestic violence or sexual violence of which the employee has been a victim.

However, an employee may be absent from work for a period of not more than 104 weeks if the employee suffers serious bodily injury during or resulting directly from a criminal offence that renders the employee unable to hold his regular position.

- ✓ For organizations under federal jurisdiction, Section 239 of the *Canada Labour Code* specifies that an employee is protected for any absence that does not exceed 17 weeks.
- ✓ If the absence is the result of an occupational injury within the meaning of the *Act respecting industrial accidents and occupational diseases (AIAOD)*, it will be treated differently:
 - If the company has fewer than 20 workers, the right to return to work¹ will be 1 year;
 - If the company has more than 20 workers, it will be 2 years.

¹ Period during which the position is protected by law.



“The right to return to work forces the employer to reinstate the worker who once again becomes capable of occupying their job or an equivalent job, with the salary and all the benefits associated with it. A worker who remains unable to return to their job or an equivalent job due to their occupational injury has the right to occupy the first suitable job available with their employer, subject to the rules relating to seniority provided for in the employee’s collective agreement, if applicable.”²”

Other considerations

If the company is unionized, the collective agreement in force may contain provisions governing the situation of an absent employee. These provisions often include clauses to maintain seniority and employment for a determined period, most often for a period of two (2) years. The employee is deemed to have lost their job after this period and therefore is no longer covered by the provisions of the agreement.

But unilaterally severing the employment relationship is not without risk³. These clauses do not always apply automatically.

This is a termination of employment called “administrative dismissal” and it must take into account the concept of the duty to accommodate⁴.

The employer must demonstrate that the employee's absenteeism rate is excessive compared to the absenteeism rate of other employees and that there is no reason to believe that, in the foreseeable future, the employee will be able to provide normal and regular work within the organization.

This process must be well documented and very often supported by a medical assessment.

² Glossary of the *Commission des normes, de l'équité, de la santé et de la sécurité du travail*.

³ A non-unionized employee, who has accumulated more than two (2) years of continuous service within the company, may file a complaint under Section 124 ALS by stating that they were a victim of a dismissal without good and sufficient cause. An employee with less than two (2) years of continuous service also benefits from an appeal under Section 122 ALS and can claim that they were dismissed due to their sick leave.

⁴ You can refer to the *Obligation to Accommodate* tool for more information.



Before terminating the employment of an employee on medical disability:

- 1 Demonstrate that the deadline provided for by law or the collective agreement has elapsed**
- 2 Ensure that the prognosis for reintegration is low**
- 3 Demonstrate a high rate of absenteeism by the employee**
- 4 Validate whether a suitable job is available in your organization and that no accommodation is possible without undue hardship**
- 5 Validate your risks based on the employee's recourse**

Although it is not of equal value as a collective agreement, mentions of information on the loss/severance of the employment relationship in an employee handbook or in company policy can facilitate the management of these situations. For example, there is a loss of employment “following an absence due to illness or accident, other than an occupational injury, for a period exceeding twenty-four (24) consecutive months”.

In addition, we suggest maintaining dialogue with the absent employee throughout the leave and involving them as much as possible in the reasonable accommodation and termination assessment process.



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Why do some say that the employment relationship can be severed after 2 years?

In disability insurance, many policies provide total disability coverage of the “own job” type for the first 24 months. After this period, the case is reassessed according to the definition of disability for any gainful employment.

The change in definition by the insurer may therefore prove to be favourable for the assessment of maintenance of the employment relationship since the insurer will question the notion of capacity for their own job.

Be aware, however, that regardless of the result of the change in definition, it does not relieve you of the notion of duty to accommodate and other elements presented above.

Do disability insurance benefits cease if the employment relationship is severed?

No. Disability benefits will continue to be paid by the insurer as long as the insured's condition meets the definition of disability provided for in the contract, even if the employment relationship is expected to be terminated or is severed.

What are the impacts for the employee if the employment relationship is severed?

- ✓ Loss of seniority and health benefits. The employee must join the spouse's plan or register with the RAMQ.
- ✓ Maintenance of life and accidental death and dismemberment insurance coverage to be validated according to the contract and insurer in place.

This work is a general information document and does not constitute a legal opinion.

Before proceeding with severance of the employment relationship, do not hesitate to seek legal advice on the matter or to consult the human resources professional in your organization.

For more information, do not hesitate to contact us so that we can assist you in managing workplace attendance and in the context of problematic disability cases.

⁵ Periods may vary from contract to contract.



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IMPLEMENTATION OF A HEALTH PROMOTION PROGRAM

The implementation of a workplace health promotion program is associated with the presence or development of a "health-driven culture". This kind of culture is increasingly sought after by employees. Organizations that follow suit therefore stand out and are favoured for attraction and retention of the best talent.

The success of a health promotion/wellness program is reflected in:

- an improvement in the work climate
- enhanced creativity, quality of decisions and service
- increased motivation and employee engagement

We can also observe:

- a reduction of conflicts and absenteeism
- a reduction in group insurance and CNESST costs
- a decrease in turnover and presenteeism



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This non-exhaustive tool aims to guide your reflections before starting to implement a program concerning the health and well-being of employees. It should be noted that management practices, lifestyle, work environment and personal/professional life balance are all elements that refer to health and well-being.

Here are the main steps in implementing a workplace health program:

1 Startup

1. Obtain management's agreement and engagement
2. Appoint a lead and form a health/wellness committee
3. Collect relevant information¹
4. Set an organizational objective for the process

2 Planning

1. Choose interventions
2. Set sub-objectives
3. Establish an action plan including an annual calendar

3 Implementation, Evaluation and Monitoring

1. Implement the program
2. Evaluate results for each activity or project
3. Monitor and adjust the program accordingly

The 7 Success Factors of a Workplace Health Promotion Program

1. Management engagement
2. Favourable corporate culture
3. Program objectives linked to those of the organization
4. Incentive programs
5. Effective communications²
6. Program evaluation
7. Sufficient budget

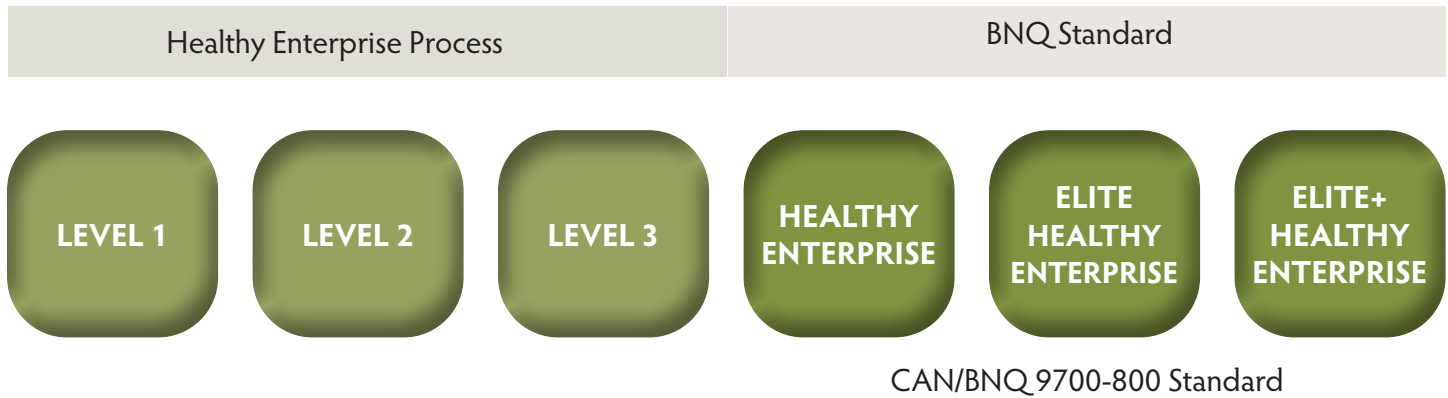
¹ Absenteeism rate and data on absences, data on drug and health care consumption, health checks, surveys, assessments of management practices, etc.

² Promotion of the program and dissemination of results.



Below is an overview of the main standards and certifications available in the area of occupational health.

The “Healthy Enterprise” Continuum:



Other examples of standards and certifications available in relation to occupational health:

- Psychological Health and Safety in the Workplace (CAN/CSA-Z1003-/BNQ 9700-803)
- Outstanding Employer (BNQ 9825-900)
- Occupational Health and Safety Management System ISO 45001

Remember that we are available to assist in your reflection and setting up a program.

Regarding the Healthy Enterprise process, you can refer to the website of the *Healthy Enterprises Group* at the following address: www.groupeentreprisesensante.com

To obtain documentation on the above standards, visit the *Bureau de normalization du Québec* (BNQ) website at the following address: www.bnq.qc.ca



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PSYCHOSOCIAL RISK FACTORS

This tool aims to increase your awareness on the impacts of psychosocial risk factors and the role of the organization in protecting the mental health of employees. A psychologically healthy and safe work environment offers great benefits and encourages attendance at work.

We agree that, in general, the employee has primary responsibility for their health and well-being. However, workplaces can foster or, on the contrary, hinder psychological well-being. In addition, in a mental health issue, even if the employer is not the source of the problem, it can be part of the solution.

Why be concerned about psychosocial risks at work?

- ✓ To prevent and reduce adverse impacts on psychological health (distress, depression, anxiety disorder) and physical health (musculoskeletal disorders, cardiovascular disease).
- ✓ To reduce health costs that affect productivity: absenteeism, staff turnover, presenteeism, early retirement, work accidents, etc.
- ✓ To meet legal responsibilities in terms of occupational health and safety, which also covers psychological health (OHS Act Section 51).

According to the CSA Z1003-13 (R2018) standard, "Psychological Health and Safety in the Workplace – Prevention, Promotion, and Guidance to Staged Implementation", a psychologically healthy and safe work environment is defined as: a work environment that promotes the psychological well-being of workers and actively prevents harm to their mental health through negligence or recklessness, or deliberately.

Also according to this standard, mental health is a "state of well-being that enables everyone to realize their potential, to cope with normal life difficulties, to work successfully and productively and to be able to make a contribution to the community."



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How are the psychosocial risks of work defined?

These are “factors which are linked to the organization of work, management practices, employment conditions and social relations and which increase the probability of causing adverse effects on the physical and psychological health of those exposed.” (INSPQ, 2016)

Researchers at Simon Fraser University identified thirteen psychosocial risk factors, “based on extensive studies and a review of empirical evidence from best domestic and foreign practice. These factors were also determined using existing and new Canadian jurisprudence and legislation.”

1. Psychological support
2. Organizational culture
3. Clarity of leadership and expectations
4. Courtesy and respect
5. Psychological skills and demands
6. Growth and development
7. Recognition and rewards
8. Participation and influence
9. Workload management
10. Engagement
11. Balance
12. Protection of psychological safety
13. Protection of physical safety

Other factors that can influence a person's mental health, but over which the workplace has little or no control:

- Genetics
- Personal problems
- Family problems
- Financial problems



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To begin thinking about and identifying the factors that can affect the mental health of employees, we suggest that you question the presence of one or more of the following main psychosocial factors in the workplace:

- ✓ Heavy workload and time constraints;
- ✓ Poor recognition of efforts and results;
- ✓ Little autonomy and influence in the work;
- ✓ Job insecurity;
- ✓ Poor support (help and cooperation) from colleagues or superiors;
- ✓ Psychological harassment;
- ✓ Little organizational justice.

These factors, reported by the INSPQ¹, are most often discussed in the literature. Note that the INSPQ website provides a great deal of information and tools such as a tip sheet, an identification grid and an awareness sheet.



¹ Institut national de santé publique du Québec



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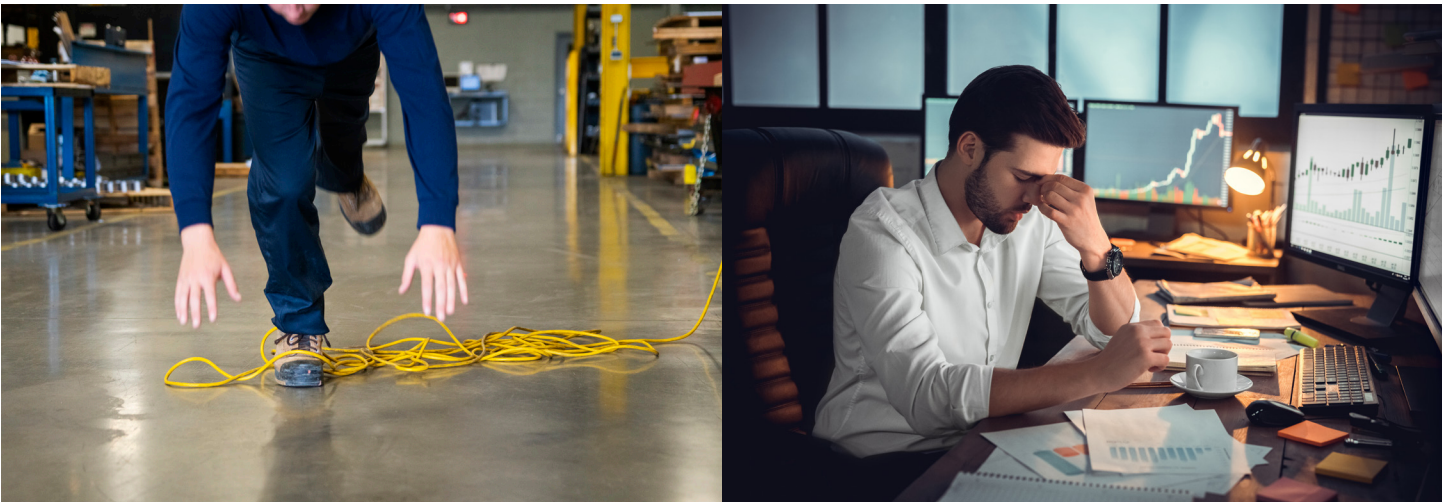
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Although they are more difficult to detect or require different assessment methods, it is essential to give psychosocial risk factors the same consideration as physical, chemical, ergonomic, biological and safety risk factors².

Safety risk factors (fall) vs psychosocial risk (workload)



These two situations, although totally different, can induce significant health problems impacting the person, those around them and the organization. Don't forget!

This document is intended to spark reflection and interest. It does not cover elements relating to the implementation of actions, programs or to the Standard in Psychological Health at Work. However, there are a multitude of free tools developed by organizations that specialize in this area. For example, the Mental Health Commission of Canada offers an Implementation Guide to the National Standard for Psychological Health and Safety in the Workplace. This guide is available free of charge.

We remain available to guide you in your research and your process.

²E.g. General mechanics, moving parts and vehicles, falls, enclosed spaces, fires, violence, etc...



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