



Developing a return to work plan

Why should you use this guide?

Developing a return to work plan in collaboration with an injured or ill worker is one of the best ways to support their recovery. Research shows workers have poorer health outcomes if they are away from work for a long time. A plan helps them return to good work, or to stay at work, while they recover.

Who is this guide for?

This guide provides practical advice for **anyone responsible for developing a return to work plan** in collaboration with the injured or ill worker. This will depend on your business and where it is located. You may be:

- a supervisor or manager in a small business
- the person in charge of HR or administration, or
- a return to work coordinator.

If you have not developed a return to work plan before, follow the suggestions in this guide and fill out the plan template that starts on [page 11](#).

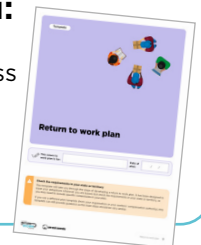
If you have more experience, this guide may improve your understanding with best practice advice on supporting a worker's return to work and psychological health.

Even if you aren't the person responsible for creating a return to work plan, this guide can help you understand the process and what support a worker may need to successfully return to work. It is important that supervisors and managers stay connected with the worker and support return to work planning. Where an employer has a return to work coordinator or a workplace rehabilitation provider, many of the responsibilities outlined in this guide may sit with them. See [page 6](#) for more information about who may be involved in developing a return to work plan.




This guide will help you:

Understand the planning process and how to make it successful ([pages 1-10](#)) and draft a plan (see template on [pages 11-18](#)).






You may also have formal responsibilities and obligations relating to return to work or workers' compensation

These responsibilities depend on your role and where you are located, so check with your insurer or your jurisdiction's workers' compensation authority. Your state or territory may have different rules for who has responsibilities for return to work planning and what training they require. Find the link to your workers' compensation authority on the [Safe Work Australia website](#).

This guide focuses on the relationships, behaviours and best practices that support a successful return to work rather than specific technical requirements. When formal obligations are mentioned in this guide, they are highlighted in orange and with a .

How should you use this guide?

The return to work planning process can be challenging to navigate for the first time, but **there are simple things you can do to improve the outcomes for an injured worker**. Return to work planning can be divided into three stages:

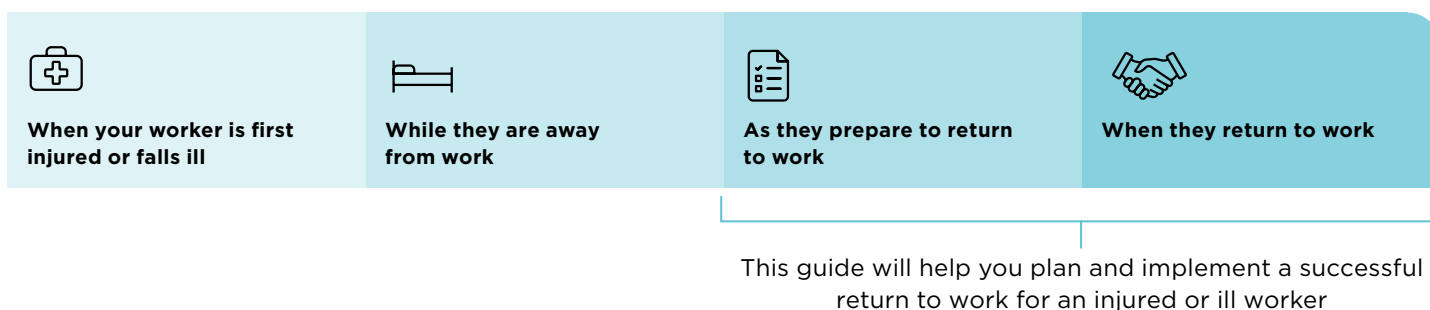
-  Prepare
-  Draft the plan
-  Implement and review

On the next page you'll find a brief overview divided into these three stages, along with key actions and tips for each stage. The rest of the guide provides more detailed advice and a return to work plan template to fill out.

This guide refers to 'return to work plans' and terms such as 'suitable duties' and 'workplace adjustments'. Please note, while your business may have different requirements or use different terms, the key concepts set out to develop a successful plan should remain the same.

Return to work timeline

This return to work timeline comes from the [Managing the relationship with an injured or ill worker during return to work](#) guide, which provides tips and conversations starters for supervisors in small to medium businesses across this whole timeline.



Want to tailor this guide to your business?

An [editable version of this guide](#) is available. You could consider:

- updating the examples and terms to ones relevant to your business or your state or territory
- including further links to relevant external materials.

This guide and template was made for the workers' compensation setting and its requirements, but the materials can be adapted to be relevant to your circumstances.



Who needs a plan?

Return to work planning doesn't need to be limited to workers who have a workers' compensation claim. As good practice, many employers choose to develop a plan for any worker after an injury or illness, even those that arise outside of work.

While this guide focuses on supporting a worker who has been away from work, it can also be used to help an injured worker that continues to work through their recovery and doesn't need any time off, or anyone returning to work that may need your help to successfully adjust.





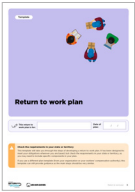



People who can help you

There are people who can help you during the workers' compensation return to work process. This could include your insurance provider, a union representative, regulator, industry bodies or a return to work specialist. For more information, go to [Workers' compensation | Safe Work Australia](#) and contact the workers' compensation authority in your state and territory.

Overview

This page provides a brief overview of the key actions and tips for developing a successful return to work plan. The remainder of the guide provides you detailed advice on each stage of the process and a return to work plan template for you to fill out.

	 Key actions	 Planning tips	 Mental health tips
 1. Prepare	<p>Reach out to the injured worker as soon as possible to check in and let them know you are here to help with their recovery.</p> <p>Talk about planning their return to work and help them understand the process.</p> <p>Contact key stakeholders. Introduce yourself and ask for information you will need to start the return to work plan.</p>	<p>Help everyone to understand their role and responsibilities. Return to work planning requires teamwork, but not everyone may be familiar with the process.</p>	<p>Acknowledge their injury and that you care about their recovery. This can help reduce stigma about injury or illness, particularly for less visible injuries such as psychological injuries.</p>
 2. Draft the plan <p>Follow template on page 11</p>	<p>Set return to work goals. Talk realistically about what might be achieved.</p> <p>Identify suitable duties and workplace adjustments. Find ways to support the worker's recovery that work for everyone.</p> <p>Document and finalise the plan during or after the planning discussion. When seeking agreement, ensure everyone involved understands the details of the plan and their responsibilities.</p>	<p>Take time to understand the worker's needs and what's reasonable for the employer. Collaboration is key to an effective plan. There's no one-size-fits-all approach.</p>	<p>Communicate clearly that you care about getting the plan right. Two workers with the same injury may have different needs and will recover better when their plan is matched to their needs.</p>
 3. Implement and review	<p>Prepare for the worker's return by implementing the plan. Provide a copy of the plan to relevant people.</p> <p>Review progress and update as required. Discuss any changes to the plan with everyone involved in their return to work.</p> <p>Complete the plan and evaluate outcomes.</p>	<p>Be prepared to change the plan as the worker's needs may change over time. Don't leave the plan on the shelf. Set the expectation that you will continue reviewing and adjusting the plan, so the worker continues to have the support they need to recover at work.</p>	<p>Stay positive even if setbacks occur. Recovery is not always a straight line and a return to work journey may not always go according to the plan. Staying positive when acknowledging challenges and setbacks can reduce their impact on long term goals.</p>



Reach out to the injured or ill worker

Before you start drafting the plan, check in with the worker and let them know you are here to help with their recovery. It can be as simple as a phone call or a text message.

In some circumstances, the first conversation may not be the right time to talk about their return to work. You could say, for example:

- “Your (physical and mental) health comes first. We can talk about work when you’re ready.”
- “You don’t have to be at 100% to return to work, we’ll support you to do the work you feel able to do.”
- “As part of supporting your recovery, we’ll need to work together to make a return to work plan.”

Focus on listening and ask questions that show you care. This can make a big difference to the worker’s motivation. If the worker is comfortable talking, let them guide the direction of the conversation as much as possible.

When the worker is injured or falls ill, it is important for their supervisor or manager to stay in touch. For tips and conversation starters for supervisors, see [Managing the relationship with an injured or ill worker during return to work](#) guide.



Did you know?

Research shows people are more likely to recover from physical injury or illness when they are at work and that delayed return to work after psychological injury is often associated with longer and more complicated recovery.

Talk about planning their return to work

If you’ve been checking in with the worker, you may have a sense if they have recovered enough to consider a return to work. You may also have information from their treating health practitioner or insurer that indicates their capacity to return.

When it is appropriate, talk to the worker about how returning to work may help them recover and explain the planning process. Let them know their participation is key to matching the plan to their needs and to help them return gradually and safely to work.



Generally, workers must participate and co-operate in return to work planning, injury management or rehabilitation, and make reasonable efforts to return to work when possible. Be sure to check the requirements in your state or territory.



Remember there are professionals – for example health practitioners, occupational therapists, insurers or workplace rehabilitation providers – who can help with injury management and treatment supporting recovery and return to work. See [page 6](#) for more information.



Take notes on what you talked about, so you don’t have to rely on your memory later.

Date: /

Key points:

You could also share these notes with your worker, for example in an email, to give them a chance to add anything you missed.



Contact key stakeholders and gather required information

A return to work plan needs input from a range of people. Talk with the worker to confirm who else is involved, so you can introduce yourself and outline their role in the process.

Before contacting anyone, check with the worker about how you will gather the information you need to start the return to work plan. For example, they may not be comfortable with you discussing their medical information with their doctor. Check if they would prefer to gather written documentation for you or if they consent to you reaching out directly to collect it. They may have already provided consent, for example, on their initial workers' compensation claim form or the certificate of capacity.

For more tips on who are the key stakeholders, see the [next page](#).



What information will I need?

Before you start creating the plan, you should have:

a return to work plan template (see [page 11](#) of this guide or use another template)

details about the claim from the worker and/or insurer

information about the pre-injury work

information about the worker's injury and capacity to work (e.g. certificate of capacity)

information about any changes made to the workplace to prevent similar injuries in the future

contact details of the treating medical practitioner, insurer, employer, and others involved in planning.



Who do I need to talk to?

Before you start creating the plan, you may need to talk with the worker's:

supervisor / manager

treating health practitioners

insurer / claims manager

workplace rehabilitation provider

Notes



Privacy at work

Information about a worker's health or medical treatment can be particularly sensitive. It must be handled appropriately and in a manner that respects their privacy. While privacy laws vary in different states and territories, access to and use of the information is limited to the worker's consent, generally on a 'need-to-know' basis. This means only what is needed to support the worker's return to work.

Who are the key stakeholders in return to work planning?

The below table provides general information only. The exact roles and responsibilities may be different according to which state or territory you're in and the specific requirements of the worker's injury or claim.

Who?	What's their role?	What information can they provide?
Worker	Recovering from injury or illness should be the worker's priority and the focus of everyone supporting them. Recovery is more likely if they return to work, so it's important they return when possible and cooperate in return to work planning, injury management and rehabilitation.	Information about their injury, individual circumstances and needs. They are at the centre of the return to work process. They are often best placed to guide actions to assist their recovery and match the plan to their needs.
Employer	Providing suitable duties, making reasonable workplace adjustments and supporting the worker when they return to work. The employer can include the worker's supervisor, senior manager, or a person in the HR department.	Information about the worker's pre-injury role and duties, the work environment, what is essential to the role and what can be adjusted, and possible barriers to returning to work, including workplace conflict. The employer will also have information about changes to the workplace in response to the worker's injury.
Return to work coordinator	Coordinating the return to work process, including the development and implementation of return to work plans. Some jurisdictions require larger employers to have a dedicated coordinator with relevant training and experience.	Information about navigating the workers' compensation and return to work process and the roles and responsibilities of each stakeholder.
Treating health practitioner	Monitoring and assessing the worker's capacity, medical restrictions, providing advice on duties, and identifying potential adjustments. This includes doctors, occupational therapists or other health practitioners with the primary responsibility for coordinating the injured worker's medical care.	Information about the worker's injury, treatment and types of work duties that are suitable, e.g. a certificate of capacity. They may need more information about the work role and demands to provide advice to inform support strategies. You might ask the worker to seek further advice or arrange for the health practitioner to contact you directly.
Insurer / claims manager	Supporting the injured worker and other parties in the process as needed. These organisations issue workers' compensation policies, manage the collection of premiums and assess and manage workers' compensation claims.	Information about the claim, including any relevant claims decisions or requirements. They may also have insights on barriers to return to work from their own interactions with the worker, for example through early screening.
Workplace rehabilitation provider	May be engaged, for example, if a worker has complex recovery needs. They provide expert independent advice and services on rehabilitation and return to work.	Information from the services they undertake, usually at the workplace and in collaboration with other stakeholders. This could include an assessment of the activities a worker can perform, identification of workplace risk factors, and advice on suitable duties and workplace adjustments.



STAGE 2: DRAFT THE PLAN

Lead a planning discussion

In the planning discussion, you bring together people involved in the worker's return to work. This discussion aims to find ways to support the worker's recovery that work for everyone. When planning the discussion:

- **Arrange a time to have the planning discussion as soon as possible.** This gives everyone time to prepare and implement the plan before the worker returns or to promptly assist them if they are recovering at work.
- **Be prepared to have more than one discussion.** People may need time to assess what is possible or get information before finalising the plan.
- **Ask the worker how they prefer to have the discussion.** It could be in person or a phone or video call. It could be a group discussion or separate discussions with the worker and other relevant people.
- **Consider what supports the worker needs to participate.** They may prefer to have a support person, family member or other representative present. You may also need an interpreter if the worker prefers to communicate in a language other than English.

In this discussion, go through the plan template ([page 11](#)) with the injured worker and other relevant people, following the guidance and filling out each page. For more advice on how to make the plan successful, see the [next page](#).

Planning discussions may involve differences in opinion, uncertain outcomes or sensitive topics. For further advice, see the [Fair Work Ombudsman's guide](#) on how to handle a difficult conversation in the workplace.



Arrangements for planning discussion

Date: / /

Time:

Other details:



Follow the template (starting on [page 11](#))

Use the **return to work plan template** to support the planning discussion.

When you have finalised the plan, return to **Stage 3: Implement and review.**



How do I help the plan be successful?

Encourage collaboration

Positive return to work outcomes are more likely when people work together as a team to support the worker's return to work.

However, not everyone may be familiar with the process. You can get better participation and outcomes when everyone understands their role and responsibilities.



Match the plan to the worker's needs

Communicate clearly that you care about getting it right and let the worker lead the conversation about what they need. Making assumptions is dangerous. Instead ask, "what does that mean for you?"

Injury, illness and medical treatment can affect different people in different ways. Take the time to understand the support they need.



PERSON-CENTRED APPROACH

Provide a supportive workplace

Raise awareness about how important it is that the worker returns to a positive environment, free from stigma toward injury or illness. Effective return to work approaches address a worker's physical and psychological needs and support healthy relationships with people they work with.

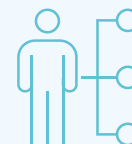
During the planning process, workers may feel their injury or illness is being questioned. It can help to focus on their recovery and on what they can do, rather than what they can't.



Respond to changes

Recovery will not always be a straight line and sometimes there are setbacks. This is normal but can impact the worker's mental health. Be positive while acknowledging the challenges.

Review the changes you make to the worker's workplace and work duties. Do they still suit the worker's needs? Be prepared to keep adapting the plan as the worker recovers.





Begin preparing for their return to work

When the injured or ill worker is nearing their return to work, the plan should be implemented in preparation for their return. This includes providing a copy of the plan to relevant people and making sure co-workers know how to support any changes made for the returning worker. Try to keep the team informed of any impacts relevant to them while maintaining the worker's privacy. This is a period of adjustment and transition for everyone.

Having the plan in place before the worker returns is vital. The worker's first days back can be challenging, but having the plan already implemented can help them feel listened to and welcome. For more tips on how the worker's supervisor and team can prepare, see [Managing the relationship with an injured or ill worker during return to work](#) guide.



Stigma around work-related injury and illness is common, particularly with psychological injuries due to the lack of physical symptoms, and can lead to further psychological harm that may substantially delay the worker's recovery. For more information, see Safe Work Australia's resources on [Workers' compensation stigma](#).



How do I implement the plan?

After the plan is finalised and everyone involved understands their responsibilities, you should:

- provide a copy of the plan (or any relevant parts) to key people responsible for the implementation and success of the plan
- confirm the worker understands the plan and is prepared for their return to work
- confirm with the worker's supervisor that the workplace is prepared for the worker's return
- confirm the worker's team (and any other key people) are aware of the plan and know to support the returning worker.

Review progress and update as required

As you agreed in the plan, review how the plan is going. Talk with the worker about their general wellbeing and what has and hasn't been working. You may need to check in with the worker's supervisor or manager to ensure they have followed through on their obligations in the plan.



Did you know?

Research suggests that people often stick to a plan better if others check in on their progress.

The plan is a resource to help the worker return and stay at work. It is key for the worker's first days back, but also important to use and keep updated as they recover, if there are setbacks, or if there are changes to who is involved in the worker's return to work. Don't leave it on the shelf. Discuss any changes to the plan with everyone involved.



How do I review the plan?

Once the worker has settled in, there are a number of things you can do to ensure the plan continues to support their return to work. You should:

- set up regular meetings to review how things are going
- check in on the worker's recovery and general wellbeing
- ask the worker whether the suitable duties and workplace adjustments have been helpful
- check in with the worker's supervisor about how things are going
- discuss any changes to the plan with everyone involved.



Complete the plan and evaluate outcomes

The return to work plan may end when:

- the goals of the plan have been achieved
- further workplace rehabilitation is no longer appropriate or required, or
- the workers' compensation claim is closed.

However, consider if continuing the plan and having ongoing conversations will help support the worker.



What if the plan is not followed?

The worker and the employer may have legal obligations to make genuine efforts to comply with the agreed return to work plan. The obligations may be linked to continued provision of benefits or even fines. This depends on where you are, so check the requirements in your state or territory.



Evaluate the return to work planning experience

Were the goals of the plan achieved?

What worked well about the return to work process?

What could be improved about the process?



Return to work plan



This return to work plan is for:

Date of plan:

Check the requirements in your state or territory

This template will take you through the steps of developing a return to work plan. It has been designed to meet your obligations wherever you are based, but check the requirements in your state or territory, as you may need to include specific components in your plan. Find the link to your workers' compensation authority at [Workers' compensation | Safe Work Australia](#).

If you use a different plan template (from your business or your workers' compensation authority), this template can still provide guidance as the main steps should be very similar.



RETURN TO WORK PLAN



Key information

Name of worker

Date of birth

Worker phone

Worker email

Emergency contact details

Insurer

Claim number

Plan developed by

Phone / email



Pre-injury work information

Worker's pre-injury job title

Name of employer

Details about worker's pre-injury work, for example, days/hours, work location



Taking care during stressful periods

The return to work process can be stressful, particularly for the injured or ill worker, but also for others involved in supporting their return to work. There is a range of support available. Consider calling or visiting:

- A GP
- [Lifeline Australia](#): 13 11 14
- An employee assistance program
- [MensLine Australia](#): 1300 78 99 78
- [Beyond Blue](#): 1300 224 636

Small business owners can also access business specific support through Beyond Blue's [NewAccess](#) mental health support program.



Injury/illness and treatment details

Information from the health practitioner treating the worker is essential to understand how they can return to work. The treating health practitioner may provide a certificate of capacity that sets out the worker’s capacity to work and any medical restrictions.

If the available information is not sufficient or clear for supporting the development of the plan, the worker can seek further advice or arrange for the health practitioner to contact you directly. Often, the health practitioner can provide more tailored medical advice when they are given information about the work role, demands and tasks.

This advice will help identify ways to make the work and the workplace suit the worker as they recover. It should help you understand:

- the nature of the worker’s injury or illness
- the worker’s capacity and their ability to perform their role
- any restrictions on specific tasks or activities
- estimated timeframes for their return to work and recovery
- how to safely increase work duties or reduce support as they recover, and
- other factors affecting recovery or capacity (e.g. side effects of any medication).



Check if it is appropriate to communicate with any health practitioners involved in managing the worker’s injury or illness. You might ask the insurer or the worker to follow up with them.



Medical assessment

Describe details of the injury/illness, medical restrictions or reduced capacity that may impact return to work arrangements, including from the certificate of capacity and discussions with the treating health practitioner or worker. If available, you can attach the written medical advice to the plan.

Note: in South Australia, this section of the plan needs to include the date of injury.



Treatment arrangements during this plan

List any upcoming treatment that may impact return to work arrangements.

Treatment	When



Set return to work goals

Setting goals helps engage the worker in their return to work and target the plan at what is important in their life and circumstances. Setting clear and achievable goals can:

- **Improve their confidence in the plan.** Defining goals and planning how to achieve them can reduce anxiety and improve the outcome of rehabilitation and recovery.
- **Motivate them to stick to the plan.** It often helps to think about what their recovery means for them outside of work, as well as to identify their skills and experience and what motivates them in the workplace.

Talk with the worker about what they would like to achieve. For example:

- “Since your injury, what can’t you do that you want to do?”
- “What are you finding more difficult now that you’d like to be easier?”
- “How will you know when you no longer need support?”

There are no hard and fast rules when goal setting, but these ideas might help:

- **Talk realistically about what might be achieved.** Draw on advice from their treating health practitioners and their supervisor.
- **It is okay to start small.** It is common to have very general goals, like “get back to work” or “return to full duties”. The trick is to turn these into smaller or incremental milestones. Think about how to modify their duties and the workplace as they recover. For ideas, see the next sections on [identifying suitable duties](#) and [workplace adjustments](#).
- **Goals can be about more than just work.** For example, a worker’s goals may also include caring for their children, finishing their study or returning to gardening.

In some cases, because of the nature of the injury or other circumstances, it may not be possible for a worker to return to their pre-injury job and duties. Instead, a goal may include a change in their duties, an alternative role, or in limited circumstances, starting with a new employer.



Did you know?

Goals can change through the planning process and as the worker recovers. Each return to work journey will be different and may not end up going as expected.



Describe any recovery and return to work goals.

Goal	Target date
Return to work goals	
Short-term milestones	



Identify suitable duties

‘Suitable duties’ means identifying where changes may be required to a worker’s normal duties and how they work to help them while they recover from an injury or illness. Sometimes a simple change can make a huge difference.

For example, consider changing:

- **Work tasks:** avoid duties specified in medical restrictions, rotate through more and less demanding tasks, provide alternative duties and training.
- **Work hours:** work half days or part-time hours, provide more time between work shifts for sleep and recovery, schedule work to avoid periods of high or low demand.
- **Work pacing:** alternate during work hours between periods of full duties and periods of rest, allow for more breaks and time-limited tasks.

Consider the plan’s goals and the worker’s skills and experience. Returning to meaningful work, drawing on their strengths, leads to better outcomes for everyone. What duties are suitable may change over time, so consider how to modify their duties to match their abilities as they recover.

Finding suitable duties may require a constructive and creative approach, using advice from the treating health practitioners, and having the support and cooperation of the employer.



Physical and psychological injuries can both lead to a worker needing time off work, but may require different types of changes. For specific questions to think about when coming up with suitable duties and workplace adjustments for workers recovering from physical or psychological injuries, see the [Getting the best from your worker with suitable duties](#) guide.



Employers may have formal obligations to provide suitable duties and make reasonable workplace adjustments. Check the requirements in your state or territory.



Providing suitable duties that are meaningful and fit in with the team can really help. It can help reduce time away from work and the chance of further psychological or physical injury. Workers can keep up a routine, regain confidence and get stronger gradually.



Describe the changes to the worker’s duties and hours, including what tasks will be suitable, what tasks they should avoid, and when they will be required.

Suitable duties	When



Identify workplace adjustments

'Workplace adjustments' means identifying where changes may be required to the workplace, processes or practices to help the injured or ill worker while they recover. These changes are beyond a worker's duties and may impact how others work and the broader work environment.

Find out what changes have been made to the workplace to support the worker's recovery and help prevent similar injuries in the future. This includes addressing physical hazards, like slippery floors or blind spots, or psychosocial hazards, like factors that lead to workplace conflict or bullying.

Discuss what further workplace adjustments would help while they recover at work. For example, changes to:

- **How the supervisor manages work:** allow extra time to complete tasks, provide written instructions, break complex work into simpler tasks
- **Workplace policies to allow flexible or remote work:** support working remotely, allow variable start and finish times
- **The work area:** assess and modify workstations or locations, improve accessibility, reduce noise
- **The level of support:** provide a mentor they trust or a peer support system, allow calls during work hours to external support people, encourage accessing an Employee Assistance Program or other support (see [page 12](#)).

Some workplace adjustments may be needed only *occasionally*. For example:

- the supervisor agrees the worker may need a break when their injury is causing heightened stress
- the manager acknowledges there may be periods of low morale or performance and agrees to provide additional adjustments during that time, or
- the team understands how to support the worker if things at work trigger or aggravate their injury, for example during peak workload or after a disagreement.



Unresolved workplace disagreements or conflicts can delay recovery, undermine working relationships and lead to further harm. It is essential to address them for a successful return to work.



It is important that workers return to a safe environment where physical and psychosocial hazards are identified and controlled, as required by work health and safety laws. It also reassures the worker they have been listened to and their workplace is committed to their recovery.



Describe changes to the work environment, processes or practices to support the worker's recovery and return to work, and when they will be required.

Workplace adjustments	When



Finalise



The following people have been involved in developing this return to work plan:

Worker *I will actively participate in this plan.*

Name

Signed

Date

Employer / Supervisor *I will implement this plan and support the worker through their return to work.*

Name

Signed

Date

Business name

Phone / email

Treating health practitioner

Name

Organisation

Phone / email

Insurer / claims manager

Name

Organisation

Phone / email

Workplace rehabilitation provider

Name

Organisation

Phone / email



Who will be provided a copy of this plan?

Worker

Employer / Supervisor

Insurer / claims manager

Treating health practitioner

Workplace rehabilitation provider



In some states and territories, agreement by the worker (and sometimes, the employer) must be documented. They may have legal obligations to follow the agreed plan, so check the requirements in your state or territory.



Implement the plan

When the plan is finalised and everyone involved understands their responsibilities, it is time to implement. Return to **Stage 3: Implement and review** on [page 9](#) of the guide.