



Step-by-step return-to-work planning checklist

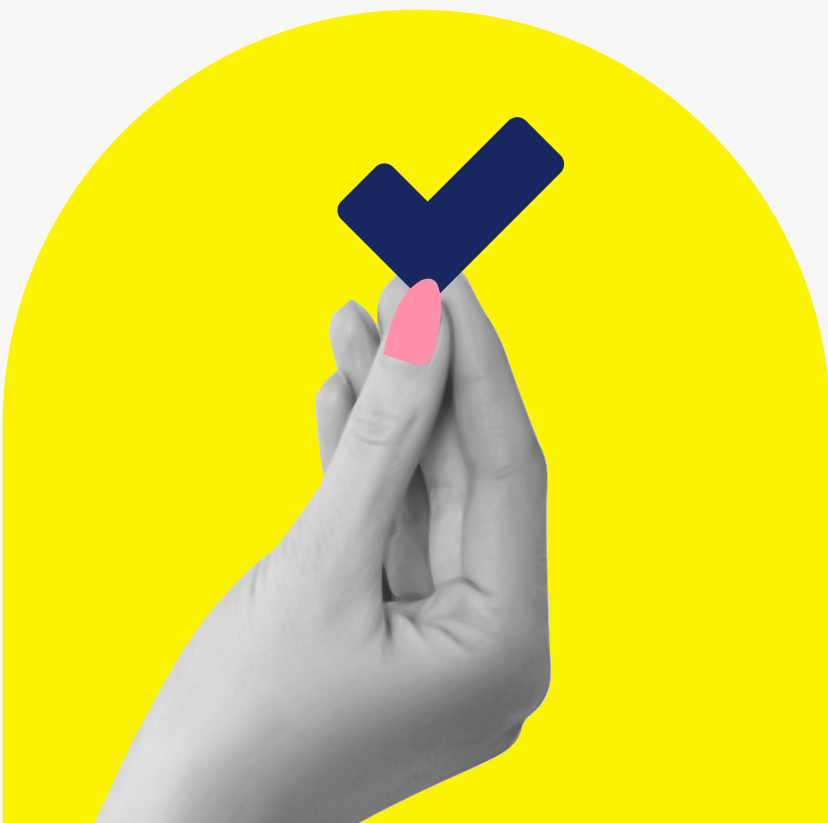
A Practical Guide for Employers

use this as your master “to-do” list
when an employee is injured.

Managing an employee's recovery and return to work can feel daunting, especially in a small business where every person counts.

This Step-by-Step Return-to-Work Planning Checklist gives owners and RTW Coordinators a clear, practical roadmap from the day of injury through to full duties.

It focuses on common physical injuries (with secondary mental-health considerations) and shows exactly when to involve an accredited rehabilitation provider if a case becomes complex.



Phase 1 – Day of Injury

- Provide first aid and arrange GP/hospital care
- Record incident details (who, what, when, where, how)
- Secure unsafe area/equipment to prevent repeat injuries
- Check in on the worker's wellbeing and explain next steps
- Recommending support such as coaching or counselling

Phase 2 – First 48 Hours

- Notify your workers'-comp insurer (phone or online)
- Obtain the worker's first Certificate of Capacity (CoC) from their GP
- Issue the Injury Information Pack (Injured-Worker FAQ, key contacts)
- Make a supportive call or visit, reassure them recovery comes first

Phase 3 – First Week

- Request written medical authority to speak with the GP
- List the worker's normal duties and brainstorm light-duty options
- Complete an Injury-Specific Capability Assessment with the worker

Triage: Is this a complex case?

For example are there significant functional limits, no obvious duties, psychosocial barriers, prior claims, or projected absence >4 weeks

IF yes, Consider Engaging an accredited Rehab Provider

- Send referral form and recent medical/incident info
- Book an initial worksite assessment or functional capacity evaluation

Phase 4 – Week 1-2 (Plan Finalisation)

- Schedule a GP review or multi-party case conference (invite insurer and, if engaged, rehab provider)
- Draft the Return-to-Work Plan with input from GP and rehab provider (if involved)
- Goals, graduated hours, suitable duties, workplace adjustments, review dates
- Obtain signatures (worker, employer, GP; rehab provider co-signs if engaged)
- Email the signed plan to insurer and worker; give copy to the rehab provider
- Set up the RTW Tracking Sheet (spreadsheet or logbook)

Phase 5 – Implementation & Monitoring

- Start graduated duties; supervisor checks in daily during first week back
- Update the tracking sheet weekly (hours, duties, symptoms, issues)
- Hold weekly reviews with the worker (10 minutes)
- Schedule follow-up GP reviews per CoC expiry

IF rehab provider engaged:

- Receive progress reports after each worker contact
- Action provider recommendations (ergonomic changes, graded duties)
- Modify duties/hours promptly if GP or provider adjusts restrictions
- Escalate – If two reviews show stalled progress, organise a joint GP/insurer/provider meeting to reset goals

Phase 6 – Fit for Full Duties & Closure

- GP issues “fit for pre-injury duties” clearance
- Gradually remove restrictions over 1-2 weeks (provider oversight if engaged)
- Confirm with insurer that wage support ends; obtain final provider report
- Close the claim file – archive documents for 7 years
- Debrief with worker, team, and (if used) rehab provider – note what worked
- Update safety controls and share lessons business-wide

No two injuries – or businesses – are identical, so treat this checklist as a living guide, not a rigid rulebook. Start with the steps, then tailor them to the worker’s circumstances, your operational realities, and any clinical advice you receive. The goal is a supportive, flexible approach that keeps recovery front and centre while protecting productivity and team morale.

Stay people-focused. A quick phone call asking, “How are you feeling today?” can do more for morale than a dozen forms. Use plain language, respect privacy, and invite the worker to help shape their own return-to-work (RTW) plan. Their insight often uncovers suitable duties you hadn’t considered.

Use this checklist, adapt it, and keep empathy at the core, because a safe, timely, and respectful RTW benefits everyone involved.