



The Task Bank – Crucial for a Successful Stay at Work/Return to Work Program



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This whitepaper first appeared as an article in Presagia’s Summer 2007 newsletter and is based on the work and expertise of Robert Hall and Peter Davie, recognized experts in the disability management field. “The Task Bank – Crucial for a Successful Stay at Work/Return to Work Program” overviews the value employers and Stay at Work/Return to Work service providers can derive when this innovative tool is used in Stay at Work/Return to Work programs. It also provides best-practice steps that can be taken to implement and ensure the ongoing success of a task bank.

Stay at Work/Return to Work (SAW/RTW) programs are used by many employers to address workforce productivity, health costs and lost time related to medical issues. The SAW/RTW approach is a collaborative process designed to progressively return an employee to full work capacity following a medically related incident. It utilizes holistic case management and focuses on identifying an employee’s current abilities and matching these to intermediary transitional assignments. The goal is to keep the employee engaged and productive in the workplace and thus promote a faster recovery and control costs. The ACOEM Guideline, “Preventing Needless Work Disability by Helping People Stay Employed”, elaborates on the necessity for this approach:

“Studies have shown that the odds for return to full employment drop to 50-50 after six months of absence. Even less encouraging is the finding that the odds of a worker ever returning to work drop 50 percent by just the 12th week.”

The identification of tasks and jobs that the employee is able to perform given his/her medical restrictions is integral in a successful SAW/RTW program. As such, the “task bank” – a listing of previously identified tasks in various departments within a company – is a vital tool for the SAW/RTW manager. The task bank supports efficient and appropriate matching of work that needs to be done, to employees’ current abilities. This article examines some important elements during the creation and management of a best-practice task bank.

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Developing the task bank is usually the responsibility of the disability or SAW/RTW management team. Although one of these teams will bear most of the responsibility, it will be important for them to reach out to a number of other groups, one being supervisors and managers. Supervisors and managers will be the front-line, primary stakeholders responsible for updating available tasks and their descriptions, making their support of the system critical. One of the most effective means to engage this group is to involve them in discussions about how SAW/RTW processes can be effectively aligned with the processes of their departments, and to then use this insight when defining program and system requirements. In the ideal world supervisors and managers would be instantly open to helping with the development and ongoing maintenance of a task bank, however actually gaining their trust and cooperation can often be difficult for some of these reasons:

- Reluctance to have someone in their departments or on their teams who is not “100 percent”.
- Fear of employees in RTW becoming re-injured.
- Concern that other employees will react negatively to someone performing partial duties.

To overcome these, they should be shown how the creation of a task bank directly addresses each of these issues. First, because managers and supervisors are the ones identifying tasks that need to be done, they ensure each employee in a transitional assignment is doing meaningful work that helps the team. Secondly, by matching the employee’s current abilities with specific tasks, the potential for re-injury is minimized. Thirdly, a simple, defined process to update tasks can overcome resistance to the new responsibility and increase enthusiasm – in reality every department has tasks that need to be done and reluctant supervisors and

managers should quickly realize this. Lastly, their input during the development phase gives them a sense of control over the program in their departments, increasing responsibility and accountability.

Another critical component in the development of a task bank system is upper management support. Often viewed as another business expense with vague ROI, you will need to present a strong business case demonstrating the cost-benefit ratio of the proposed task bank solution. This should look at health costs, indemnity costs, estimated productivity losses, lost days and more, and compare them to the cost and time that will be spent on the task bank. Buy-in from upper management is important because directives and support from the top will demonstrate that SAW/RTW is now a part of the corporate culture.

Motivating employees to want to return to the workplace early is another important factor. In most workplaces employees feel that when they are injured or ill and have a doctor's note to stay home, they should unquestionably do so. In truth though, it is more therapeutically and economically beneficial for them to be engaged in a best-practice SAW/RTW program that allows them to re-start work on a limited basis and progressively return to full work capacity. As mentioned previously, the longer an individual is away from the workplace after an illness or injury, the slimmer the chances are that the person will ever return to work.

Some benefits that can be conveyed to employees are:

1. By performing a transitional work assignment the employee can maintain more of his/her full salary and benefits.

2. Returning to the workplace maintains an important social and emotional connection for many people - they can feel productive through their interactions with others.
3. Remaining engaged overcomes the psychologically detrimental disability mindset.

Once the task bank system has been effectively sold within the organization, some fundamental processes must be instilled. To start, transitional assignments should be viewed as an interim step in the physical recovery process. With that in mind, a best-practice is to utilize transitional work assignments in a progressive fashion, consistent with functional improvements. A good process for identifying transitional tasks is:

- Look for tasks that are not getting done now.
- Look for tasks that regular workers do not have time for.
- Look for projects that need to be done.
- Look for tasks that would free up regular employees' time.
- Look for tasks that are valuable to a department.
- Look for tasks to meet business needs.

Managing the transitional return to work process is a crucial aspect of effective case management and the team should closely monitor medical recovery to ensure the transitional assignment is always consistent with the workers' current functional abilities. Utilizing available technologies to initially select the most appropriate assignment and continually manage the process can be highly beneficial to the overall process and lead to a more timely return to full productivity.

A task bank is a collaborative effort that requires ongoing input from supervisors and managers, human resources, disability and return to work managers and potentially others. In addition to properly identifying task opportunities, some basic information will need to be captured for each task. This information can vary depending on the type of jobs involved, industry, etc., but should typically include:

- Task name and description of duties
- Location (department, facility, etc.)
- Work hours
- Name of supervisor/manager and contact info
- Detailed description of physical and mental work requirements that can be matched to a given employee's functional abilities

Once the system is set up, the disability manager or SAW/RTW coordinator should maintain regular communication with all parties involved to ensure the task bank is updated regularly (this can be supported with software that enables quick online task updating). A primary reason this is important is that in many some cases a disability or SAW/RTW coordinator will need to look outside an employee's department to arrange a transitional assignment. Putting together a transitional assignment on an ad hoc basis is time consuming and burdensome for all involved, however with advance planning the employee's abilities can be easily matched to tasks that need to be done in other departments. For example, an industrial worker who cannot return immediately to his or her regular department may be able to perform non-physically demanding work in another department, such as quality control and inspection, shipping and receiving, or research and design.

The task bank is at the heart of the best-practice SAW/RTW program because properly matching injured and ill employees to appropriate transitional assignments

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is crucial to the process. A well-defined, efficient, and planned task matching process can ensure ongoing support for the SAW/RTW approach. The task bank has the potential to change the work injury/illness culture from one of disability to ability, thus creating a fundamental shift in thinking that focuses on the positive and can generate huge economic and social benefits for the employee and employer.

To learn more about SAW/RTW programs and Task Banks or about how Presagia AtWork, Presagia's Absence & Disability Management software solution can address these in your organization, please feel free to contact us at info@presagia.com or +1 514-847-7474.

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Dr. Hall has worked in the Absence and Disability Management and Rehabilitation fields for over 25 years and is a Director at Presagia. Prior, he was a co-founder of AtWork Resources (acquired by Presagia in 2006), developer of the AtWork Manager software. In his career, Dr. Hall has consulted with and provided training and consulting to a variety of employers and health and human service organizations in the areas of disability management, the ADA, and Stay at Work/Return to Work programs. Dr. Hall has lectured nationally and internationally and has written a variety of articles and papers on the above topics. He is also an Adjunct Professor in San Diego State University's graduate Rehabilitation Counseling Program.

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