

Jefferson County

Human Resources Department/Equity & Inclusion Division



Interactive Process for Reasonable Accommodation Checklist

This purpose of this document is to aid management and HR professionals in the Interactive Process for ADA Accommodations. The interactive process must be started when any of the following have occurred:

- An employee requests an accommodation.
- An employee puts management on notice that he or she is unable to do an essential function of their job due to a medical reason.

Once either of the above occurs, follow the steps below:

Process Steps / Form	Instructions
<p><u>Step 1:</u> Figure 1 – Employee Request for Accommodation</p> <p>Date Completed: _____</p> <p>Completed by: _____</p>	<ul style="list-style-type: none"> • Have employee complete the Request for Reasonable Accommodation. • If employee gives you a doctor’s note, review to ensure you have enough information to make a temporary accommodation and proceed to step 2. File original request in Confidential Employee Medical File.
<p><u>Step 2:</u> Letter regarding Interactive Process Figure 2. - Response to a Request for Reasonable Accommodation Medical Release Form / Medical Inquiry Form</p> <p>Date Completed: _____</p> <p>Completed by: _____</p>	<p>Provide employee with Letter regarding Interactive Process which includes deadlines for paperwork. Have employee sign the Medical Release Form (Figure 5) and provide the job description that lists the essential job duties of the position.</p> <ul style="list-style-type: none"> • Make copies of both forms and file in Employee Confidential Medical File.
<p><u>Step 3:</u> Determine if the Accommodation Requested is Reasonable. For assistance with accommodations see http://askjan.org/links/about.htm</p> <p>IMPORTANT: Remember that the interactive process is two way communication between the employer and employee. The employer should not be deciding for the employee what the accommodation should be. If the request made is not reasonable, the employer can suggest alternative accommodations that would be considered reasonable.</p>	<ul style="list-style-type: none"> • <i>If the request was reasonable</i>, complete Figure 4 – the Employee Accommodation Approval Letter. • Schedule meeting to discuss with employee. Best Practice is to meet with the employee face to face. Have the employee sign and date that they accept the accommodation provided. File the original in the employee’s Medical File. Document Interactive Meeting in section below. • <i>If request is not reasonable and is an undue hardship</i>, have interactive meeting, whether by phone or face-to-face, and discuss with employee. Document what is discussed in the Interactive Meetings section below. • After the meeting, complete Form 3 – the Denial of Accommodation Letter. Mail the original to employee (certified mail), make a copy and to be

