
Individual Accommodation Plan Process and Return to Work Process

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1.	Individual Accommodation Plan and Return to Work Process	2
1.1	Individual Accommodation Plan (“IAP) Process	2
1.2	Return to Work Process	3
1.3	Confidentiality	4
1.4	Further Information	4

1. Individual Accommodation Plan Process and Return to Work Process (Ontario)

Macquarie is committed to providing a work environment that is inclusive and to removing any barriers in employment faced by employees with disabilities. As such, Macquarie aims to provide a work environment that complies with the requirements of the Employment Standard in the *Integrated Accessibility Standards, Ontario Regulation 191/11* and as established under the *Accessibility for Ontarians with Disabilities Act, 2005*. To meet these statutory requirements, Macquarie has put in place this policy to:

- Document in writing the procedure for requesting an accommodation due to a disability, including upon return to work from a disability-related leave of absence; and
- Document the steps that Macquarie will take to implement individualized accommodation and return to work plans in the case of disability-related accommodations.

Macquarie will deal with all requests made under this policy promptly and on an individualized basis.

1.1 Individual Accommodation Plan (“IAP”) Process

If an employee requires accommodation in the workplace due to a disability, Macquarie will work with the employee to document, in each applicable case, a written IAP in accordance with the following process:

- **Recognizing the Need for Accommodation:** Either the employee or the employee’s manager or hiring manager should advise an immediate supervisor or manager, a Human Resources Business Partner, or a member of the Employee Relations Team that the employee requires accommodation due to a disability.
- **Gathering Further Relevant Information:** The employee is an active participant in this step. The employee will provide Macquarie with information and documentation regarding the employee’s functional abilities and advise how Macquarie may be able to accommodate the disability. Macquarie may require more detailed information about the request and/or the employee’s needs and restrictions. This may include the need for written support or confirmation from third parties. In addition, Macquarie can, at its discretion, request an evaluation by an outside medical or other expert, at Macquarie expense, to assist in assessing potential options to accommodate the employee.
- **Assessing Available Options:** Available options to provide the employee with a requested accommodation will be considered and evaluated. The employee may be asked to provide, consider or discuss alternative solutions. The

employee will be consulted in the evaluation process with a view to finding reasonable accommodation. Ultimately, however, it is up to Macquarie to determine, what, if any, reasonable accommodations will be provided based on the documentation submitted by the employee and Macquarie's operational needs.

- **Documenting an IAP:** After identifying the most appropriate accommodations, the details will be documented in a written IAP. An IAP will include the following (as applicable):
 - The accommodation(s) that will be provided;
 - The identification of any accessible formats or communication supports needed;
 - Any emergency information or emergency response plans needed; and
 - The duration of the plan and the frequency with which it will be reviewed and updated.

Once finalized, the employee will be given a copy of the IAP in an accessible format, if required.

- **Implementing, Monitoring and Reviewing the IAP:** After implementing the IAP, the employee and Human Resources will monitor and review the IAP to ensure that it is effective. Formal reviews and updates will take place on the mutually agreed upon, predetermined schedule in the employee's IAP. If the accommodation is no longer appropriate, the employee's needs will be reassessed and the IAP will be updated. The IAP will also be reviewed if the employee's disability-related needs have changed or if the employee's work location or position changes.

If Macquarie determines the accommodation is not required or if Macquarie cannot accommodate the employee without undue hardship, the employee will be provided with the reasons for this decision. Ideally notification will be made in person by the employee's manager, a member of the Human Resources or Employee Relations team or other appropriate member of management (or any combination thereof). Where an in-person meeting is not practical or available, the employee requesting the accommodation may be notified of the decision in writing (including via electronic means)

At any stage in the planning process, the Employee can request that a representative from the workplace participate in the development of an accommodation plan.

1.2 Return to Work Process

Macquarie is committed to supporting any employee who has been absent from work due to a disability and reintegrating the employee back into the workplace. As such, with the employee's consent, Macquarie aims to maintain regular contact with the employee while on leave to facilitate the return to work process.

In the case of a request for accommodation upon return to work due to a disability-related leave, Macquarie will generally follow the process set out above for

responding to a request for accommodation and, additionally, will document in each case a written, individualized return to work plan (“Plan”). A Plan will include the following (as applicable):

- The goal of the return to work process (e.g. return to original job, return to modified work, return to alternate role);
- The identification of any limitations or transitional measures needed to accommodate the employee in the return to work process;
- The identification of any alternate roles or positions available to the employee temporarily or permanently.

The employee will be given a copy of the Plan in an accessible format, if required. After implementing the Plan, the employee and manager will monitor and review the Plan regularly to ensure that it remains effective and will update the Plan if necessary.

Please note that this return to work process does not replace or override any other return to work process created by or under any other statute.

1.3 Confidentiality

Confidentiality will be maintained throughout the accommodation and return to work process to the extent consistent with the actions taken by Macquarie to respond to any requests.

Macquarie will retain, in a secure location, all information and documentation provided to it as part of the accommodation and return to work processes. Such information will be shared with others on a “need to know” basis only or upon the written request of the employee requesting the accommodation.

1.4 Further Information

For further information, please contact a Human Resources or Employee Relations representative.