

**Instructions for RTW Conceptualization Worksheet**  
(Couperthwaite & Ray, 2023)

Purpose:

The Return-to-Work (RTW) Conceptualization Worksheet is a tool that was designed by psychologists, for psychologists, working in a Worker's Compensation context. The tool provides a framework for psychologists to clinically formulate individualized RTW recommendations for individuals who are experiencing a mental health condition(s) secondary to workplace accidents, traumas, injuries, or illnesses to optimize the individual person's ability to initiate and maintain a successful RTW.

Background:

Before attempting to use the worksheet, the psychologist should have a good understanding of the differences between limitations, accommodations, and restrictions, as well as the difference between diagnosis and disability (i.e., diagnosis does not equal disability). In addition, the psychologist should have a good understanding of the person. Ideally, they will have completed a thorough psycho-diagnostic assessment, including specific symptoms and their impact on the person's functioning, as well as an overall case formulation. The psychologist should also have a good understanding of the person's readiness and ability to remain at work (if applicable) or RTW following a period of absence.

Uses/Benefits:

Use of this form can assist with providing nuanced, understandable, and actionable functional abilities and functional impairment information, tied to diagnoses/symptoms, to support the formulation of RTW recommendations in a Worker's Compensation context. This includes rationale for potential opinions about temporary or permanent limitations, accommodations and/or psychological restrictions. These linkages are important for decision makers in a Worker's Compensation System, such as Case Managers, Adjudicators, and others, who need to understand the clinical rationale for recommendations before they can accept them in the context of claim-related policies and procedures.

Disclaimers:

This worksheet is subject to copyright © 2023 Couperthwaite & Ray. No unauthorized copying, or distribution is allowed for use in contexts other than to help with clinical formulation of individual clients in a clinical context, without the written permission of the authors. Please do not amend or publish the worksheet without the written permission of the authors and appropriate citation.

The worksheet should not be used or shared with others without inclusion of this Instruction sheet containing the contact information of the authors. This information is provided for informational/educational purposes only.

Anyone utilizing the worksheet retains full responsibility for directing care for their individual clients, for making specific recommendations for their individual clients with a WCB claim that result from completion of the worksheet, and for practicing within their areas of competence.

Document Reference:

Couperthwaite, L. M. Z. & Ray, C. A. (June 22, 2023). Clinical considerations when formulating RTW recommendations in a worker's compensation system. Continuing education (CE) credit workshop presented at the Canadian Psychological Association Conference, Toronto, Ontario, Canada.

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RTW Conceptualization Worksheet (Couperthwaite & Ray, 2023)

<b>Psychological Themes, with potential job demands</b> *derived from Mayer 1998, 2005; Blais & Smith, 2014	<b>Psychological Symptoms (Compensable Condition)</b>	<b>Functional Impairment and/or Risk of Symptom Decompensation</b>	<b>Restrictions, Limitations, Accommodations, and/or Other Recommendations</b>
<b>Emotional/Affective</b> Consider, for example: <ul style="list-style-type: none"> <li>• Distress tolerance</li> <li>• Unpredictability tolerance</li> <li>• Emotional concealment</li> <li>• Emotional reactivity</li> <li>• Trauma cues/reminders</li> <li>• Threat perception</li> </ul>			
<b>Behavioural</b> Consider, for example: <ul style="list-style-type: none"> <li>• Task completion</li> <li>• Initiative</li> <li>• Control</li> <li>• Autonomy</li> <li>• Shift/work hours</li> </ul>			
<b>Thinking/Cognitive</b> Consider, for example: <ul style="list-style-type: none"> <li>• Attention/sustained concentration.</li> <li>• Organizing/planning</li> <li>• Memory/learning</li> <li>• Pace</li> <li>• Decision making</li> </ul>			

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<b>Interpersonal/Social</b> Consider, for example: <ul style="list-style-type: none"> <li>• Privacy</li> <li>• Type/level of contact</li> <li>• Social support</li> <li>• Control/autonomy</li> <li>• Interpersonal intensity</li> </ul>			
<b>Self/Identity</b> Consider, for example: <ul style="list-style-type: none"> <li>• Meaning</li> <li>• Usefulness</li> <li>• Contribution</li> <li>• Role identity</li> <li>• Role clarity</li> <li>• Esteem/confidence</li> </ul>			
<b>Coping/Safety</b> Consider, for example: <ul style="list-style-type: none"> <li>• Risk of harm to self</li> <li>• Risk of harm to others</li> <li>• Substance use</li> <li>• Other maladaptive coping</li> </ul>			

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