



Worksite Visit Checklist

A practical guide for Exercise Physiologists supporting RTW programs

Making the Most of Your Worksite Visit

In occupational rehab, assumptions can lead to missteps. Clients often describe their job tasks to the best of their ability and recollection but when was the last time you thought about your own job tasks at a biomechanical level, considering all the forces and movement patterns at play? Until you see the tasks in action, the full picture often remains unclear. This checklist helps EPs plan, structure and make the most of every worksite visit. It's designed to ensure that what you observe translates into meaningful, task-specific exercise programming and sustainable return-to-work (RTW) plans. Use this tool to:

- Clarify the goals of your program before arriving on site
- Capture the key physical, cognitive and environmental demands
- Turn insights into actionable rehab strategies



How to Use This Resource

- **Before the visit:** Use this checklist as a planning tool before you step foot on site. Filling out this section in advance means you'll arrive prepared and ready to focus on what matters most.
- **During the visit:** Use Section 2 to note key observations about the environment, tasks and psychosocial factors. Ask workers or supervisors to demonstrate tasks or clarify unclear movements.
- **After the visit:** Use Section 3 to summarise what you learned and how it will inform your rehab plan. Using the checklist as a debrief tool not only sharpens your recommendations but also provides clear evidence for reports, progress updates and case discussions.

1. Pre-Visit Planning

- ☐ Re-confirm rehab goals with the referrer or insurer (e.g. same occ, any occ, same job, similar job etc)
- ☐ Review any available task analysis, job description or workplace assessment report outlining the client's current role, duties, and key limitations
- ☐ Identify what you need to see to clarify rehab direction
- ☐ Obtain necessary workplace permissions and safety clearances
- ☐ Prepare client and employer for what to expect during the visit

2. On-Site Observation Prompts

PHYSICAL DEMANDS

- ☐ What tasks require sustained or repetitive postures?
- ☐ What loads are lifted, carried, or pushed? (approx. weights, distances)
- ☐ Are tasks performed overhead, at floor level, or across variable heights?
- ☐ How much walking, standing, or sitting is required?

ENVIRONMENTAL FACTORS

- ☐ Temperature, lighting and confined space conditions
- ☐ Equipment setup and accessibility
- ☐ Noise, distractions, or safety risks

COGNITIVE & PSYCHOSOCIAL DEMANDS

- ☐ Decision-making load, time pressure, or task complexity
- ☐ Signs of fatigue or cognitive overload during tasks
- ☐ Interactions with team members, customers or other stressors?

3. Post-Visit Reflection

- ☐ How does what you saw differ from the client's description?
- ☐ Which exercises or interventions need to change based on these findings?
- ☐ What movement patterns or muscle groups need to be strengthened to support performance of the duties?
- ☐ What fatigue or pacing strategies should be incorporated?
- ☐ Key takeaway: What one change will make this client's exercise program more targeted and effective?



Tip: Worksite visits aren't just about observation, they're about translation. Translate what you see into data-driven, task-specific exercise programs that help clients get back to work and stay at work.