



**start**  
 Manager/supervisor suspects an employee is having difficulty performing an assigned job function due to a disability.

Manager/supervisor begins interactive dialogue with employee by saying, "I have noticed you have had difficulty performing 'X' job function lately. Is there anything that I can do to help you?"

Employee does not disclose a disability to manager/supervisor.  
**end**

**start or continue**  
 Employee discloses a disability to manager/supervisor.

Manager/supervisor begins or continues interactive dialogue with employee by asking, "How can I help you?"

Employee does not request an employment accommodation.

Manager/supervisor creates written documentation regarding his/her commencement of an interactive dialogue and the employee's decline for help and/or lack of request for assistance/accommodation.<sup>1</sup>

Employee requests an employment accommodation from manager/supervisor.

Manager/supervisor refers employee to HR using the HR referral letter<sup>2</sup> and guidelines.

Employee does not contact HR to request an employment accommodation despite the referral from the employee's manager/supervisor.

Employee contacts HR to request an employment accommodation.

HR reviews employee's medical/professional disability verification documentation to determine if the employee qualifies as an employee with a disability under the California Fair Employment Housing Act (FEHA) or the Americans with Disabilities Act (ADA).

Employee does not qualify as having a disability under FEHA or ADA.  
**end**

Employee qualifies as having a disability under FEHA and/or ADA.

HR meets with the employee to discuss his/her specific functional limitations resulting from the disability as they relate to his/her job functions. HR and the employee assess potential barriers to job performance to determine if they can be mitigated with a reasonable and appropriate employment accommodation.

HR consults with the employee's manager/supervisor to identify any undue hardship, discuss business necessities, and assess the effectiveness of the proposed accommodation in enabling the employee to perform his/her essential job functions.<sup>3</sup>

HR determines there are no reasonable and appropriate employment accommodations and informs employee and/or manager/supervisor.  
**end**

If appropriate, HR prescribes reasonable employment accommodation(s) to the employee and the employee's manager/supervisor.

Employment accommodation(s) is/are put in place by HR, manager/supervisor, and/or employee.  
**end**

# Trigger to the Interactive Process:

## Interactions Between the Employee, Manager/Supervisor & Human Resources

Cal Poly Human Resources (HR) is the University's administrative program charged with collecting confidential medical and professional verification of a qualified employee's disability to determine reasonable and appropriate employment accommodations.

To determine reasonable and appropriate employment accommodations for qualified Cal Poly employees, HR engages in an interactive process with the employee and the employee's manager/supervisor. The interactive process is the collaborative process by which HR, an employee, and an employee's manager/supervisor engage in discussion, review, and/or implementation of reasonable and appropriate employment accommodations.

The interactive process may be an ongoing process as the employee's condition and/or position description change overtime.

The "Trigger to the Interactive Process" flowchart is a tool to assist managers and supervisors in understanding the points at which the interactive process can start and end, as well as the responsibilities and interactions between the employee, manager/supervisor, and HR within the interactive process. Employees may also find this flowchart as a helpful tool. This flowchart is meant as a general guide and should not be substituted for direct consultation with HR regarding complex employee disability related issues.

**INSTRUCTIONS:** To use this flowchart, identify the starting point that best matches your current scenario. For example, how would you use this flowchart to understand what to do if an employee discloses a disability to you? For this example, you would follow the start point corresponding with the scenario in question, which is in this case the purple "start" point. From the purple start point, continue following direction of the path that best matches the scenario in question. When you encounter an "end" point, it signifies the interactive process has ended for the time being.

<sup>1</sup>Documentation is to be kept in a confidential file separate from the employee's personnel file.

<sup>2</sup>Copy of HR referral letter is also sent to the HR.

<sup>3</sup>Manager/supervisor is responsible for maintaining information discussed during the interactive process confidential. HR does not disclose confidential medical/professional verification of employee's disability to manager/supervisor.