

JOB DEMANDS ANALYSIS | REQUEST FOR QUOTE CHECKLIST

Information requested to define the assessment scope and prepare an accurate quotation.

HOW TO USE THIS CHECKLIST

Complete as much information as is currently available. This checklist supports quotation only and does not replace the supervisor pre-assessment questionnaire completed after services are confirmed.

1 | ORGANIZATION & REQUEST CONTACT

ORGANIZATION 	DATE OF REQUEST
PRIMARY CONTACT NAME 	POSITION / DEPARTMENT
EMAIL 	TELEPHONE
BILLING CONTACT, IF DIFFERENT 	PO / VENDOR REQUIREMENTS

2 | PURPOSE OF THE JDA

☐ Return-to-work planning	☐ Workplace accommodation
☐ Job matching / abilities comparison	☐ Modified duties
☐ Graduated return-to-work planning	☐ Disability management
☐ Proactive job-demand documentation	☐ Other purpose

BRIEFLY DESCRIBE THE DECISION OR WORKPLACE NEED THE JDA IS INTENDED TO SUPPORT

3 | SERVICE REQUESTED

☐ Not sure - please recommend	☐ Modular JDA
☐ Premium Comprehensive JDA	☐ Discuss options before quotation

FOR A MODULAR JDA

The General Physical Demands Analysis is the core assessment. Select any additional modules being considered.

☐ Core: General Physical Demands Analysis	☐ Add-on: Detailed Job Task Analysis
☐ Add-on: Sensory Demands Analysis	☐ Add-on: Cognitive & Psychosocial Analysis

QUESTIONS OR REQUESTED DELIVERABLES

PRIVACY

Do not include worker names, diagnoses, medical history or other personal health information. The JDA documents job requirements; it does not independently assess an individual worker's abilities.

REQUEST FOR QUOTE CHECKLIST | WORKSITE & JOB OVERVIEW

Location and work-organization details help determine travel, access and assessment time.

4 | PRIMARY WORKSITE & TRAVEL INFORMATION

PRIMARY WORKSITE ADDRESS, INCLUDING POSTAL CODE

SITE CONTACT NAME

SITE CONTACT PHONE / EMAIL

DEPARTMENT / WORK AREA

REQUESTED ASSESSMENT LOCATION WITHIN SITE

☐ Single worksite / location

☐ Multiple worksites / locations

☐ Number of locations not confirmed

☐ Mobile / community-based work

TOTAL NUMBER OF SITES TO BE ASSESSED

APPROX. TRAVEL DISTANCE BETWEEN SITES

ADDITIONAL WORKSITE ADDRESSES

DIFFERENCES IN DUTIES, EQUIPMENT, LAYOUT, STAFFING OR WORK PRACTICES BETWEEN SITES

PARKING, LOADING, SITE-ENTRY OR TRAVEL CONSIDERATIONS

5 | JOB OVERVIEW

JOB TITLE

DEPARTMENT / SERVICE AREA

NUMBER OF WORKERS IN THIS ROLE

TYPICAL SHIFT LENGTH

TYPICAL WORK SCHEDULE / SHIFT(S)

SUPERVISOR / MANAGER FOR THE ROLE

BRIEF JOB PURPOSE / OVERVIEW

MAIN JOB TASKS (OR ATTACH A TASK LIST / JOB DESCRIPTION)

☐ Office / administrative

☐ Industrial / manufacturing

☐ Healthcare / care setting

☐ Residential / hospitality

☐ Outdoor / field work

☐ Vehicle / mobile / community

☐ Public-facing / customer service

☐ Other work setting

REQUEST FOR QUOTE CHECKLIST | COMPLEXITY & OBSERVATION

These details help estimate the workplace-assessment and analysis time required.

6 | JOB COMPLEXITY & VARIABILITY

APPROXIMATE NUMBER OF DISTINCT JOB TASKS

APPROXIMATE NUMBER OF WORK AREAS USED

☐ Mostly routine and predictable work

☐ Tasks / priorities vary through shift

☐ Peak workload periods or deadlines

☐ Seasonal, infrequent or irregular tasks

☐ Demands differ by shift or day

☐ Demands differ by site / location

☐ Emergency, on-call or urgent duties

☐ Safety-sensitive / high-consequence duties

☐ Specialized tools, equipment or vehicles

☐ Material handling or force demands

☐ High cognitive / multitasking demands

☐ Interpersonal / emotional demands

☐ Lone work / limited assistance

☐ Supervisory / delegated responsibilities

VARIABLE, PEAK, SEASONAL, EMERGENCY OR INFREQUENT DUTIES TO BE REPRESENTED

TASKS REQUIRING EXTENDED OBSERVATION, MULTIPLE DEMONSTRATIONS OR SPECIALIZED MEASUREMENT

7 | WORKPLACE OBSERVATION & ACCESS

☐ Routine tasks can be observed

☐ Some routine tasks cannot be observed

☐ Task demonstrations will be required

☐ Multiple workers / shifts may be needed

☐ Knowledgeable worker can participate

☐ Manager / supervisor can participate

☐ Relevant photographs are permitted

☐ Photography restricted / approval needed

☐ Objective measurements are permitted

☐ After-hours / weekend visit may be needed

BEST DAY(S) / TIME(S) TO OBSERVE WORK

TIME NEEDED TO SEE A FULL WORK CYCLE

TASKS OR CONDITIONS THAT MAY NOT OCCUR DURING THE PROPOSED VISIT

SECURITY, ORIENTATION, PPE, INFECTION-CONTROL, ESCORT OR RESTRICTED-AREA REQUIREMENTS

OTHER OPERATIONAL, PRIVACY, LANGUAGE OR SCHEDULING CONSIDERATIONS

REQUEST FOR QUOTE CHECKLIST | DOCUMENTS & TIMING

Available records and coordinated scheduling can reduce assessment time and improve quote accuracy.

8 | INFORMATION AVAILABLE FOR REVIEW

☐ Current job description	☐ Task list / work routines
☐ SOPs / work procedures	☐ Previous JDA / PDA / assessment
☐ Training / competency materials	☐ Shift / staffing information
☐ Equipment specifications / manuals	☐ Floor plan / site map
☐ Production / workload information	☐ No supporting documents available

OTHER RELEVANT RECORDS, ATTACHMENTS OR BACKGROUND INFORMATION

9 | PARTICIPANTS & VALIDATION

WHO CAN EXPLAIN OR DEMONSTRATE THE WORK? INCLUDE NAMES, ROLES AND AVAILABILITY

EMPLOYER REPRESENTATIVE FOR FACTUAL VALIDATION

WORKER / UNION REPRESENTATIVE, IF APPLICABLE

10 | TIMING, RELATED ASSESSMENTS & QUOTE NOTES

PREFERRED ASSESSMENT DATE(S)

REQUIRED REPORT DATE, IF APPLICABLE

DEADLINE, OPERATIONAL WINDOW OR SCHEDULING CONSTRAINT

☐ One job role is being quoted

☐ Multiple job roles / assessments

☐ May coordinate on the same day

☐ May complete in planned batches

ESTIMATED NUMBER OF ROLES / ASSESSMENTS

PROPOSED SEQUENCING OR GROUPING

ADDITIONAL INFORMATION AFFECTING SCOPE, COMPLEXITY, TRAVEL OR QUOTATION

QUOTE ASSUMPTIONS

The quotation will be based on the information provided. Changes to the job, sites, requested modules, access requirements or agreed scope may require a revised quotation. Services beyond the agreed scope may be billed separately.

CHECKLIST COMPLETED BY

DATE COMPLETED

POSITION / ORGANIZATION

PREFERRED FOLLOW-UP METHOD

SUBMIT WITH AVAILABLE SUPPORTING DOCUMENTS

A Registered Occupational Therapist will review the information, clarify outstanding scope questions and prepare the quotation.