

# Accommodation Advisor Packet— Walmart/Sam’s

## Accommodation Advisor Instruction Sheet

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Dear Accommodation Advisor (Facility Management or Human Resources Representative):

At Walmart, every associate and job applicant has full access to equal employment opportunities. We will provide associates who have a *disability* with *reasonable accommodations* to enable them to perform the essential functions of their jobs, seek new jobs within Walmart, and enjoy the benefits of employment. Walmart will also provide *reasonable accommodations* during the hiring process to job applicants with a *disability*.

This document provides a summary of the Management Guidelines and directives for responding to associate requests for job assistance per the **Accommodation in Employment (Medical-Related) Policy**.

**IMPORTANT NOTIFICATION:** If the associate’s request for job assistance is accompanied by a note from the associate’s health care provider that indicates the associate cannot perform the essential functions of their job, or if the associate specifically indicates they cannot perform an essential function of their job, **do not immediately place the associate on Leave of Absence (LOA)**. If the associate is unable to perform the essential job functions, you should determine if there is an open posted vacant job in your facility the associate can satisfactorily and safely perform during the request process. **The associate may be placed on LOA if there is no such open vacant position in your facility.** Contact the Accommodation Service Center (ASC) at [855-489-1600](tel:855-489-1600) for further assistance.

## California Notice: Pregnancy, Childbirth, Breastfeeding, or Related Medical Conditions

You must give an associate a copy of the California notice “Your Rights and Obligations as a Pregnant Employee” as soon as either of the following occurs: 1) The associate informs you that she is pregnant; 2) The associate inquires about reasonable accommodation, transfer, or pregnancy disability leave. In addition, the “Breastfeeding Mothers’ Support Policy – California” should be provided to an associate when s/he makes a parental or pregnancy leave inquiry.

## Accommodation Advisor Review Process

**STEP 1: Interactive Discussion Required**—It is important that you engage in an interactive process to obtain information that will assist the company in better understanding the associate’s abilities and accommodation needs. Walmart welcomes your accommodation suggestions. Interactive discussions should be ongoing and includes answering their questions whenever possible. Associates can be directed back to ASC.

**STEP 2: Identifying a Request for Job Assistance**—An associate may request job assistance in a variety of ways. They may make the request directly, or a family member, friend, job coach, health professional, or other person may make a request on an associate’s behalf. The request may be made verbally or in writing. The request does not have to include the words “reasonable” or “accommodation.” The need for accommodation assistance must relate to the associate’s medical condition.

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### **Accommodation Advisor Review Process (Continued)**

- STEP 3: Job Adjustment (JA) Review and Approval**—Any request for accommodation should first be reviewed as a job adjustment [refer to the Accommodation in Employment (Medical-Related) Management Guidelines]. *If approved at facility level, please complete the attached Facility Job Adjustment Approval Form.* The form can be used to note any approval stipulations such as any approval time limits or other condition of use. The form along with any supporting documentation should be placed in the associate's medical file.
- STEP 4: Requests that Cannot be Approved as Facility JAs**—If you are unable to approve the request as a JA, *direct the associate to contact the Accommodation Service Center at Sedgwick by calling [855-489-1600](tel:855-489-1600) Monday–Friday, 8 a.m.–5 p.m. Central time.* Please make arrangements with the associate to make the call during his or her normal work hours and in a private area. The associate should have their WIN available. *If the associate will not make the call, you should make the call on his or her behalf.*
- STEP 5: Claim Notification and Assistance**—Facility Management and Human Resources Representative will be sent email notification of the accommodation request. The notification will summarize the type of accommodation requested. The medical packet will be attached to the notification. *All completed forms and supporting documents should be faxed to [859-280-3264](tel:859-280-3264).* ASC will work closely with the facility to facilitate a quick resolution upon receipt of completed documents.
- STEP 6: Known and Observable Conditions/Restrictions**—A completed Medical Questionnaire may not be necessary if the associate's limitations and/or disability are known or easily observable (e.g., associate is in a wheelchair, or utilizing intermittent FMLA leave to attend dialysis treatment, etc.) or if they present other types of acceptable supporting medical documentation. If the condition is easily observable or known, use Question 2a of the Fax Coversheet to explain. Advise the associate that ASC may still request additional supporting medical documentation, if needed.
- STEP 7: Pre-Determination Notification and Final Determination**—ASC will send a Pre-determination letter to the facility. The facility will have two business days to comment on the recommended determination. If a timely response is not received, the determination will be finalized and communicated directly to the associate. You will be responsible for ensuring the determination is followed and assisting them if they wish to have the determination reconsidered.

## Fax Cover Sheet: Accommodation Request

Date: \_\_\_\_\_ Total # of pages (including cover page): \_\_\_\_\_

To: **ACCOMMODATION SERVICE CENTER (ASC)** ASC FAX #: **859-280-3264**

From: \_\_\_\_\_  
Sender's Name and Job Title (Please Print) Sender Phone # Facility #/State

Re: \_\_\_\_\_  
Associate Name and WIN Associate Job Title Job Code

**Transmittal Information** (please check appropriate box):

- New Accommodation Request Packet/Forms (if checked, please complete the Facility Observations Section)  
 New/Additional Medical Documentation  Request for Reconsideration  Other \_\_\_\_\_

**Instructions: The Facility Observations section must be completed if you are faxing a new accommodation request. Please refer to the Facility Manager Accommodation Instruction. If you have any questions, please contact the Accommodation Service Center (ASC) at [855-489-1600](tel:855-489-1600).**

### Facility Observations

1. Is the associate currently off work?  Yes  No
  - 1a. If Yes, check applicable box:  FMLA/Medical  Personal/Medical  Leave Pending Accommodation  
 Other \_\_\_\_\_
  - 1b. If Yes, please indicate the first date associate has been off work: \_\_\_\_\_
  - 1c. If Yes, what is the estimated Return to Work Date: \_\_\_\_\_
2. Is the associate's condition/limitation(s) easily observable or generally known?  Yes  No
  - 2a. If Yes, please explain: \_\_\_\_\_
3. Have you reviewed this request to determine it can be granted as a Job Adjustment (JA)?  Yes  No
  - 3a. If Yes, what was the outcome? \_\_\_\_\_
4. Is this request the result of a workers' compensation injury/claim?  Yes  No
  - 4a. If Yes, what was the Date of Injury? \_\_\_\_\_ ; 4b. Date of MMI (if known): \_\_\_\_\_
5. Has this associate been previously permitted to work in a modified manner/position?  Yes  No
  - 5a. If Yes, please explain (e.g., position worked, task modified, TAD Duty, duration of modification, etc.):  
\_\_\_\_\_
6. Have other associates been similarly accommodated at your facility?  Yes  No
  - 6a. If Yes, please explain: \_\_\_\_\_
7. **Interactive Discussion:** Please summarize your accommodation discussion (e.g., associate's suggestion on how they'd like to be accommodated, their improvement timeline, estimation as to their restriction(s) and ability to work).

CONFIDENTIALITY NOTICE: This fax may contain privileged and confidential information. It is intended for the named recipient(s) only. If you are not an intended recipient, please notify the sender immediately and delete this fax from your system.

## Job Adjustments Quick Reference Guide—Stores And Clubs

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### Accommodation in Employment (Medical-Related) Policy:

The company's Accommodation in Employment (Medical-Related) policy provides an opportunity for facility management to provide a job adjustment(s) (JA) to associates with a medical condition(s) who may need assistance in performing their jobs.

The Accommodation Advisor (AA) [i.e., Facility Managers (FMs) or Human Resources Representative for Walmart and Sam's Club] is responsible for processing these types of accommodation requests. Requests for JAs should be granted (subject to specific business needs and safety concerns) if:

- the associate provides appropriate medical documentation establishing the medical need;
- the accommodation(s) is "easily achievable" (quick and easy, requires virtually no time or monetary output, etc.); and
- the accommodation(s) will not negatively impact operations.

### Granting Facility Job Adjustments

The following accommodations have been identified as generally easily achievable and should typically be granted unless doing so is not easily achievable or would cause a negative impact on operations. If an associate has a medical condition that is observable or already known, or s/he provides medical documentation that supports the need for an accommodation(s), the AA may grant the following JAs:

- **STOOLS: EXCLUDING SAM'S CLUB LOCATIONS:** A stool for associates in Cashier, Greeter, Fitting Room, Gas Station, and certain positions in which the stool would be behind a counter or podium (e.g., courtesy desk, photo center, connection center, jewelry counter, etc.) where space allows and does not pose a safety risk.  
**SAM'S CLUBS:** Advise the associate to contact the Accommodation Service Center at Sedgwick by calling [855-489-1600](tel:855-489-1600) Monday–Friday, 8 a.m.–5 p.m. Central time to request a stool accommodation.
- **DRESS CODE:** Exceptions to dress code policy if dress is appropriate to the position (e.g., open toe or open back shoes, sunglasses, hats, gloves, shorts/skirts, coats, or other outerwear) and does not pose a safety risk.
- **DRESS CODE:** Exceptions to dress code to include use of personal portable media player (e.g., iPod, MP3 player, or other listening device, etc.) in work areas so long as it does not pose a safety risk or cause a significant disruption in customer service.
- **ASSISTIVE DEVICES:** Use of personal assistive devices (e.g., walkers, canes, oxygen tanks, etc.) so long as space and safety allow.
- **FOOD/DRINK:** Water bottle or emergency food at work station except in food preparation areas or in the pharmacy.
- **PARKING:** Accessible long-term parking if associate has obtained a valid disabled parking permit (per the Workplace Standards Policy, temporary parking can be approved at the AA's discretion).
- **SCHEDULING:** Minor changes to availability and scheduling preferences (does not include approvals of set schedules, guaranteed hours, or creating special schedules).
- **EQUIPMENT:** Purchase of minor equipment/ergonomic devices that allow associates to continue work (e.g., floor mats, foot stools for office positions, magnifying glasses, fans, non-latex gloves, dust/surgical masks, cushioned or ergonomic seat covers or chairs, gel wrist pads or ergonomic keyboards, recording devices, etc.).
- **JOB ASSISTANCE:** Written notes from meetings or periodic written/verbal instructions (daily/weekly task list).
- **JOB ASSISTANCE:** Reading or training assistance, so long as it does not excuse essential functions or give associate answers to assessments.

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## **Job Adjustments Quick Reference Guide—Stores and Clubs (Continued)**

### **If Job Adjustment Not Approved**

When associates request job adjustments that do not appear on this list and/or when management or the Human Resources Representative determines granting the facility JA is not easily achievable or would cause a negative impact on operations:

- Advise the associate to contact the Accommodation Service Center at Sedgwick by calling [855-489-1600](tel:855-489-1600) Monday–Friday, 8 a.m.–5 p.m. Central time. Please make arrangements with the associate to make the call during their normal work hours and in a private area. The associate should have their WIN available. Any additional medical documentation should be faxed to ASC at [859-280-3264](tel:859-280-3264). If the associate chooses not to make the call, management or the Human Resource Representative should make the call to complete the accommodation request process on their behalf as soon as possible.

### **Approval**

If a JA is approved, the AA should utilize the attached JA Approval Form (page 6) to document the approval. Use the form to note any approval stipulations such as any approval time limits or other condition of use. The form along with any supporting documentation should be placed in the associate’s medical file. Request the associate to sign the approval form. You may provide a copy to the associate for their records. The associate should be advised that all performance or productivity requirements are still expected to be met. Every effort must be made to provide the approved JA as promptly as possible. Approved JAs should not affect the associate’s performance or productivity.

### **Questions? Call [800-530-9929](tel:800-530-9929)**

# Job Adjustments—Stores and Clubs Approval Form

Facility Number: \_\_\_\_\_ Associate WIN: \_\_\_\_\_

Associate Name: \_\_\_\_\_ Job Title: \_\_\_\_\_

## Facility Job Adjustment Approval

I approve the following JA (please check the appropriate box):

- STOOLS: EXCLUDING SAM'S CLUB LOCATIONS:** A stool for associates in Cashier, Greeter, Fitting Room, Gas Station, and certain positions in which the stool would be behind a counter or podium (e.g., courtesy desk, photo center, connection center, jewelry counter, etc.) where space allows and does not pose a safety risk.  
**SAM'S CLUBS:** Advise the associate to contact the Accommodation Service Center at Sedgwick by calling [855-489-1600](tel:855-489-1600) Monday–Friday, 8 a.m.–5 p.m. Central time to request a stool accommodation.
- DRESS CODE:** Exceptions to dress code policy if dress is appropriate to the position and does not pose a safety risk (e.g., open toe or open back shoes in office setting, vision center, or pharmacy; sunglasses, hats, gloves, shorts/skirts, coats, or other outerwear).
- DRESS CODE:** Exceptions to dress code to include use of personal portable media player (e.g., iPod, MP3 player, or other listening device, etc.) in work areas so long as it does not pose a safety risk or cause a significant disruption in customer service.
- ASSISTIVE DEVICES:** Use of personal assistive devices (e.g., walkers, canes, oxygen tanks, etc.) so long as space and safety allow.
- FOOD/DRINK:** Water bottle or emergency food at work station except in food preparation areas or in the pharmacy.
- PARKING:** Accessible long-term parking if associate has obtained a valid disabled parking permit (per the Workplace Standards Policy, temporary parking can be approved at the AA's discretion).
- SCHEDULING:** Minor changes to availability and scheduling preferences (does not include approvals of set schedules, guaranteed hours, or creating special schedules).
- EQUIPMENT:** Purchase or use of minor equipment/ergonomic devices that allow associates to continue work (e.g., floor mats, foot stools for office positions, magnifying glasses, fans, non-latex gloves, dust/surgical masks, cushioned or ergonomic seat covers or chairs, gel wrist pads or ergonomic keyboards, recording devices, etc.).
- JOB ASSISTANCE:** Written notes from meetings or periodic written/verbal instructions (daily/weekly task list).
- JOB ASSISTANCE:** Periodic reading or training assistance, so long as it does not excuse essential functions or give associate answers to assessments.

Use the space below to document your approval decision and any JA discussion with your associate. Include the approval time period (if applicable), and any pertinent stipulations (e.g., style of sunglasses, color of shoes, parking limitations, etc.)

## After a JA is Granted

- The JA may be reconsidered due to changes in business conditions or if the associate transfers to another position or facility.
- The associate must continue to be able to perform essential functions and meet applicable performance and productivity standards.
- A JA granted for a temporary impairment is limited to the duration of the impairment.
- Place this form and any relevant documentation in the associate's Medical File.
- If the JA is denied, it expires or is reconsidered due to changes in business conditions, advise the associate to call the Accommodation Service Center at [855-489-1600](tel:855-489-1600) to request an accommodation.
- Continue any current JA until final determination from ASC if associate desires continued utilization of JA.
- The associate may be provided a copy of this form.

## Questions? Call [800-530-9929](tel:800-530-9929)

Approved by (AA): \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Associate's Signature: \_\_\_\_\_ WIN: \_\_\_\_\_ Date: \_\_\_\_\_