



## INTERACTIVE PROCESS MEETING NOTES

Per VA Handbook 5975.1, section 8, "The interactive process is the communication between the Decision Making Official (DMO) and the employee, in consultation with the Reasonable Accommodation Coordinator (RAC), to determine how best to respond to the employee's request. During this process, an individualized assessment will be conducted to review essential and marginal job functions, the employee's limitations, and possible accommodations. The interactive process may require more than one discussion. The DMO or RAC will also explain the reasonable accommodation process to the employee during the 1st Interactive Process meeting.

**PLEASE NOTE:** An effective Interactive Process requires ongoing communication and cooperation, especially when a specific limitation, problem, or barrier is unclear or when the disability or an effective accommodation is not obvious. Upon conclusion of this meeting, any information shared between parties is protected and considered confidential. Under the Rehabilitation Act, the request, the disability, and any medical information obtained in the accommodation process or via other channels, must be kept confidential. Confidentiality rules regarding disability status apply to all employees and applicants, whether or not they are individuals with disabilities. Violation of the Rehabilitation Act's medical confidentiality requirements exposes the agency to liability, even if no other action is taken against the individual whose medical information is disclosed.

1. TODAY'S DATE	2. TIME (i.e. 10 a.m. EST)	3. PARTICIPANTS (full name/title) - i.e. John Doe, DMO; Jane Smith, RAC; and Paul Jones, Requestor
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### 4. DISCUSSION NOTES

Example: Initial/Follow-up meeting was conducted to inform the employee of the current status of their RA. RAC informed employee that their medical documentation was received on March 10, 20XX. The RAC provided the DMO with the employee functional limitations as authorized by VA Handbook 5975.1. DMO informed the employee that after considering their functional limitations, the essential functions of their position are what accommodation could be provided based on the functional limitations/essential functions.

### 5. FOLLOW-UP MEETING INFORMATION (as applicable)

6. TODAY'S DATE	7. TIME (i.e. 10 a.m. EST)	8. VIA (i.e., Teams Meeting, Webex Meeting, etc.)
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9. PLANNED PARTICIPANTS (full name/title) - i.e. John Doe, DMO, Jane Smith, RAC, Paul Jones or employee)

10. ADDITIONAL NOTES

11. RAC NAME	12. RAC SIGNATURE	13. DATE
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\*\*\* When sending this form via electronic means, please ensure the file is encrypted to protect the requestors PII & PHI information.

This form should be retained separately from the employee's Official (paper or electronic) Personnel File.