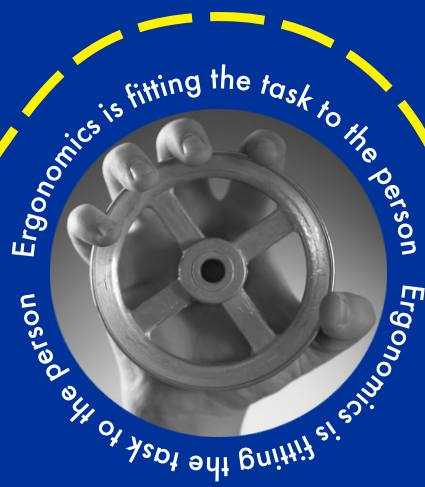
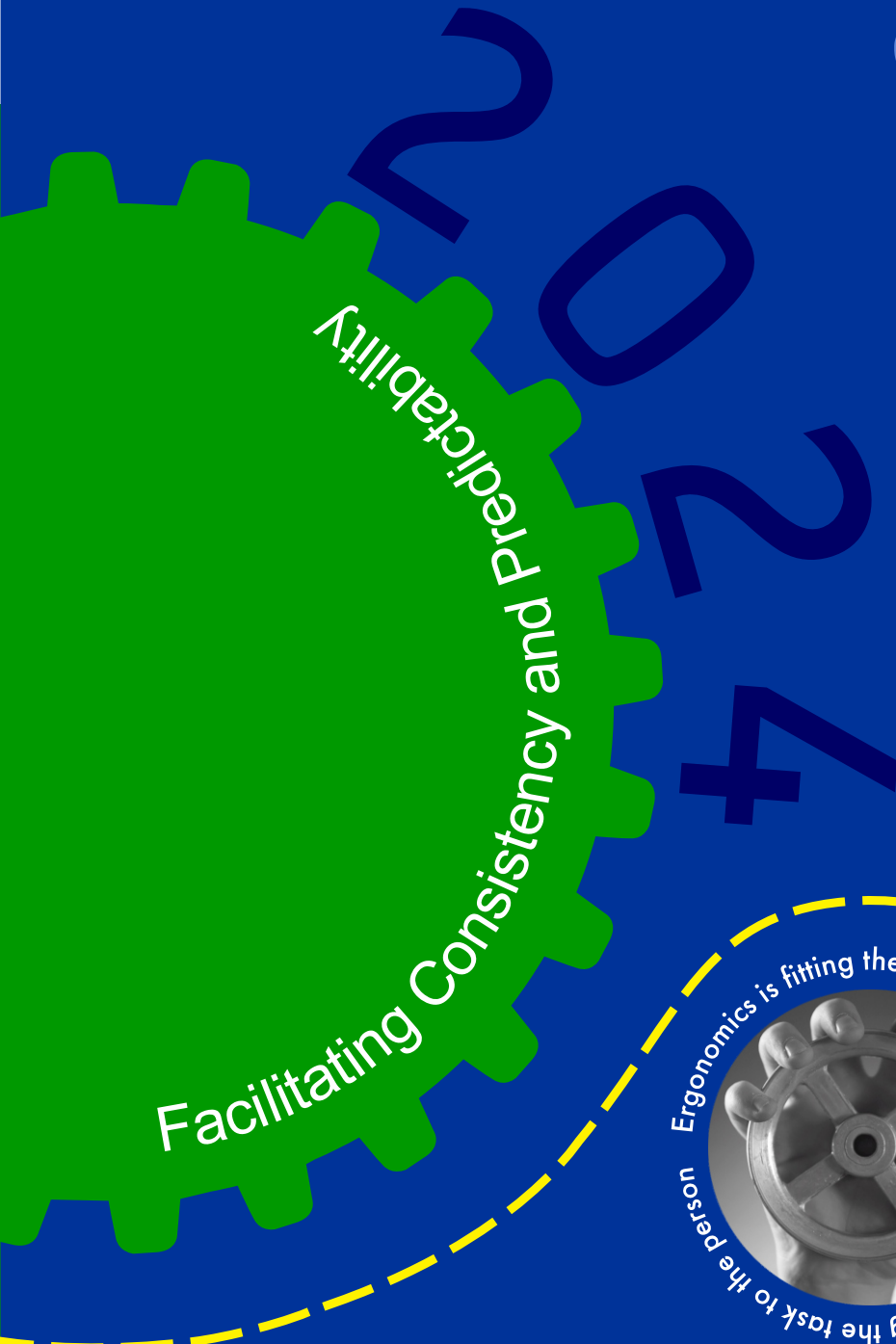




# Employee Handbook



# Acknowledgement Form

The Options Incorporated Employee Handbook provides an overview of your rights and responsibilities as a professional ergonomic consultant and the conditions and benefits of employment with Options Incorporated. Please note that this policy handbook not only enhances, but also compliments employment agreements and complies with the various legislative requirements including but not limited to the AODA, WSIB, OHSA, ESA, and CCCPE Code of Ethics for Ergonomists.

I have received my copy of the Options Incorporated Employee Handbook and I have read and understood the information. Any questions have been answered to my satisfaction by management. I understand that, while an employee of Options Incorporated, I am bound to abide by all policies and procedures set forth in this handbook.

I also understand that the information in this handbook is subject to change as situations warrant, so it is understood that changes may supersede, revise or eliminate one or more of the policies in this handbook. These changes will be communicated to me by my manager or through official notices. I accept responsibility for keeping informed of these changes.

Please sign and return this form to the Administrative Manager to maintain on file.

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Name (please print)

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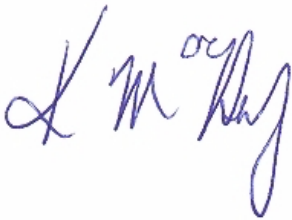
Signature

---

Date

# Annual Policies Review Certification

I certify Options Incorporated has reviewed all the policies, procedures, and processes contained within this Employee Handbook, portions in accordance with the Occupational Health and Safety Act effective the below date.

A handwritten signature in blue ink, appearing to read "K MacAulay".

Kirsti MacAulay  
President  
Options Incorporated

February 1, 2024

## Table of Contents

<b>1. President’s Message</b> .....	<b>6</b>
<b>2. Equal Opportunity Employer</b> .....	<b>7</b>
<b>3. Company Organization</b> .....	<b>7</b>
3.1. OHSA Legislative Categories.....	7
3.2. Functional Categories.....	8
3.3. ESA Employment Positions.....	8
<b>4. Mission Statement</b> .....	<b>9</b>
<b>5. Corporate Philosophy</b> .....	<b>9</b>
5.1. Principles.....	9
5.1.1. Truth.....	9
5.1.2. Trust.....	9
5.1.3. Transparency.....	9
5.1.4. Teamwork.....	10
5.1.5. Acceptance.....	10
5.1.6. Forgiveness.....	10
5.2. Embrace Change.....	10
<b>6. Code of Ethics for Ergonomists</b> .....	<b>11</b>
<b>7. Professional Client Boundaries</b> .....	<b>11</b>
7.1. What is a Contractor?.....	12
7.2. What is a Gift?.....	12
7.2.1. Orbiting Influencers.....	12
<b>8. Environmental Sustainability Policy</b> .....	<b>13</b>
<b>9. Social Commitment Policy</b> .....	<b>14</b>
9.1. Team Activity/Initiatives Guidance.....	14
<b>10. Brand Management Policy</b> .....	<b>15</b>
10.1. Primary Graphic.....	15
10.2. Brand Colour Codes.....	15
<b>11. Information Systems - Acceptable Use Policy</b> .....	<b>16</b>
11.1. Utilizing Client Information Resources.....	17
11.2. Information Security Procedures.....	17
11.2.1. Client/Public Networks & Hardware.....	17
11.2.2. Social Media.....	18
11.2.3. Photos and Video.....	18
11.2.4. Report Formatting.....	18
11.2.5. Encryption.....	19
11.2.6. Passwords.....	19
11.2.7. Software Installation and Updates.....	20
11.2.8. Clean Desk.....	20
11.2.9. Settings – iPhones and Computers.....	20
<b>12. Credit Card Policy</b> .....	<b>22</b>
<b>13. Health and Safety</b> .....	<b>23</b>
13.1. Health and Safety Policy.....	23

13.2. Duties of Employers .....	24
13.3. Duties of Supervisors .....	25
13.4. Duties of Workers .....	25
13.5. Health and Safety Representative .....	26
13.6. The Right to Refuse Work .....	26
13.7. Safety Training .....	27
13.8. Safety Communication Procedures .....	28
13.8.1. Wireless Dead Zone Communication Procedures.....	28
13.9. Hazard Identification and Investigation Policy .....	28
13.9.1. Hazard Identification Process .....	29
13.9.2. Hazard Investigation Procedure .....	29
13.9.3. Recommended Corrective Actions .....	32
13.10. Accident Investigation Policy .....	33
13.10.1. Definitions.....	33
13.10.2. Accident Investigation Process.....	34
13.10.3. Employee Responsibilities.....	35
13.10.4. Employer Responsibilities .....	35
<b>14. Workplace Harassment and Violence .....</b>	<b>36</b>
14.1. Workplace Harassment Policy .....	36
14.2. Workplace Violence Policy .....	37
14.3. Workplace Harassment and Violence Program .....	38
14.3.1. Definitions.....	39
14.3.2. Responsibilities.....	40
14.3.3. Workplace Harassment and Violence Procedures .....	42
14.3.4. Domestic Violence.....	46
14.3.5. Workplace Violence and Harassment While Travelling.....	46
14.3.6. Safety Plan .....	46
<b>15. Emergency Signal and Code Word.....</b>	<b>47</b>
15.1. Emergency Signal and Code Word Procedures.....	47
<b>16. Home Office Policy.....</b>	<b>48</b>
16.1. Ergonomic Considerations .....	49
16.2. Work Scheduling (Work Load) Impacts .....	49
16.3. Safety and Security Considerations .....	50
16.3.1. Information Security Considerations.....	50
16.3.2. Communication Procedures .....	50
16.4. Home Office Safety Checklist.....	51
16.4.1. Fire Protection .....	51
16.4.2. Emergency Procedures .....	51
16.4.3. Electrical Safety.....	51
<b>17. Disconnecting from Work.....</b>	<b>52</b>
<b>18. Accessibility for Ontarians with Disabilities .....</b>	<b>52</b>
18.1. Accessibility Policy .....	52
18.2. Customer Service Standard .....	53
<b>19. Progressive Discipline Policy .....</b>	<b>53</b>
19.1. Attendance Management Procedure.....	53
19.2. Performance Management Procedure .....	54
19.3. Smoking .....	55

19.4. Drug and Alcohol Use .....	55
<b>20. Vacation .....</b>	<b>56</b>
20.1. Vacation Entitlement .....	56
20.1.1. Prorated Vacation Entitlement Calculation .....	57
20.2. Vacation Pay .....	57
20.2.1. Salaried Employees.....	57
20.2.2. Hourly Employees .....	57
20.3. Vacation Scheduling.....	58
<b>21. Paid Time Off .....</b>	<b>58</b>
21.1.1. Scheduled Time Off.....	58
21.1.2. Unscheduled Time Off.....	58
<b>22. Unpaid Time Off.....</b>	<b>59</b>
22.1.1. Protected Leave .....	59
22.1.2. Unprotected Leave .....	59
<b>23. Christmas Shutdown .....</b>	<b>59</b>
<b>24. August Civic Holiday .....</b>	<b>60</b>
<b>25. Payroll .....</b>	<b>60</b>
25.1. Commuting Time .....	60
25.2. Travel Time.....	61
25.3. Payroll Deductions .....	61
25.4. Pay Garnishments .....	61
<b>26. Expenses Re-imbusement .....</b>	<b>64</b>
26.1. Mileage.....	64
<b>27. Benefit Eligibility .....</b>	<b>64</b>
27.1. Leave of Absences and Temporary Layoff.....	65
27.2. Long-Term Disability .....	65
<b>28. Termination of Employment.....</b>	<b>68</b>
28.1. Involuntary Termination .....	68
28.2. Resignation/Retirement.....	68
28.3. Abandonment of Employment .....	68
28.4. Payroll at Termination of Employment .....	69
<b>ANNEX A – Contact Lens Safety Policy .....</b>	<b>A-1</b>
<b>ANNEX B – Isocyanate Safety Policy .....</b>	<b>B-1</b>
<b>ANNEX C – Consulting Safety Policy .....</b>	<b>C-1</b>
<b>ANNEX D – Ergonomic Consultant Physical Demands Description with Cognitive Demands Analysis .....</b>	<b>D-1</b>
<b>ANNEX E – Senior Ergonomic Consultant Physical Demands Description with Cognitive Demands Analysis.....</b>	<b>E-1</b>
<b>ANNEX F – Supervising Ergonomist Physical and Cognitive Demands Description.....</b>	<b>F-1</b>
<b>ANNEX G – Managing Ergonomist Physical and Cognitive Demands Description.....</b>	<b>G-1</b>

# 1. President's Message



As we started this year, we reflected on the history of Options Incorporated, on our successes, challenges, and the lessons learned along the way. One consistent factor that has played a prominent role in both our successes and challenges was our ability, or in some cases inability, to embrace change.

Being agile and ready to adapt to change has consistently been a difference maker. As a result of this insight, we have taken an introspective look at our current level of readiness to embrace change, and created a focus for 2024.

Our success at managing change is directly related to the depth and agility of our team. As we have learned, our team is multi-coloured (plaid) meaning we are not all the same but bring different talents and tendencies to the table. Despite our differences, we can all continue to grow as professionals and improve what we can offer the team. As a result, Options Incorporated is choosing to prioritize coaching our team this year to be disciplined and focused, while at the same time creative and curious. The increased depth that this will create will increase our confidence and agility to better support all clients, and

new and developing projects.

As we know, our ability to achieve our goals is fully dependent on the “effort” we put in because nothing happens without intentional focus. Whether you are working to develop a skill or honing that skill towards full achievement, your efforts are directly proportional to your success. We commit to coaching and mentoring you through these opportunities and will challenge you to bring the level of effort needed to achieve success.

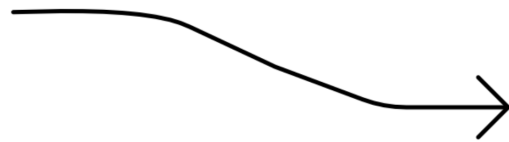
While building our corporate depth, we will continue hosting our webinars to reframe narratives and perceptions where we can, and showcasing our achievements to the larger community.

Together we will continue to grow, adapt, and purposefully embrace change!

*Charles Darwin: It is not the most intellectual of the species that survives; it is not the strongest that survives; but the species that survives is the one that is able best to adapt and adjust to the changing environment in which it finds itself.*

Kirsti MacAulay  
President  
Options Incorporated

talent x effort = skill



skill x effort = achievement

[Grit: The Power of Passion and Perseverance](#)  
Angela Duckworth, Scribner (c) 2018.



## 2. Equal Opportunity Employer

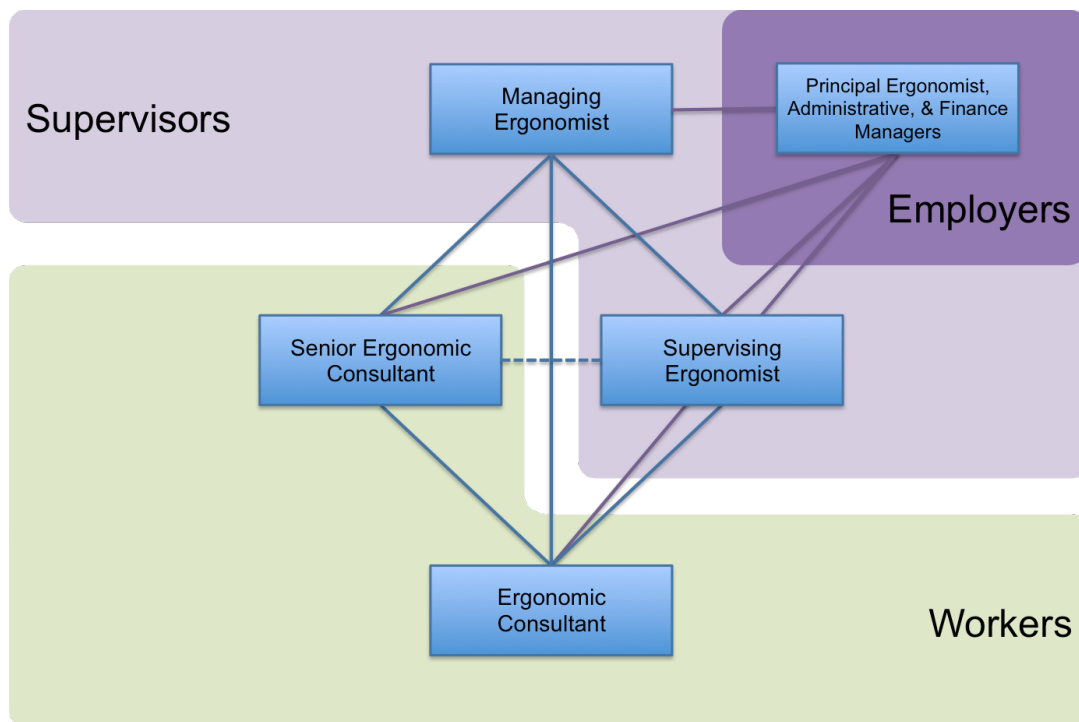
It is the policy of Options Incorporated (OI) to hire, train, challenge, and promote the best individuals in order to provide our clients with the best possible service.

OI strives for a relationship with all employees that demonstrate a fundamental respect for individuals and their contributions to the OI team.

Decisions concerning all employees are based on individual skills, initiative and capability, regardless of race, ancestry, place of origin, colour, ethnic origin, citizenship, religious beliefs, disabilities, age, sex, sexual orientation, marital status, family status, receipt of public assistance, or record of offences.

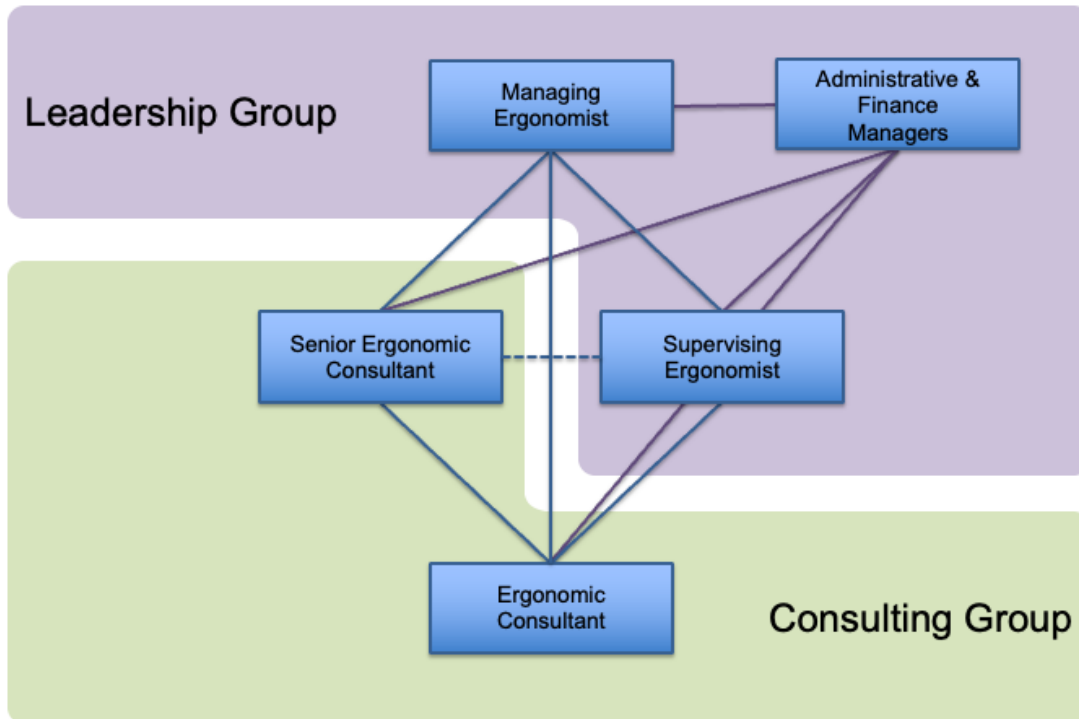
## 3. Company Organization

### 3.1. OHSA Legislative Categories

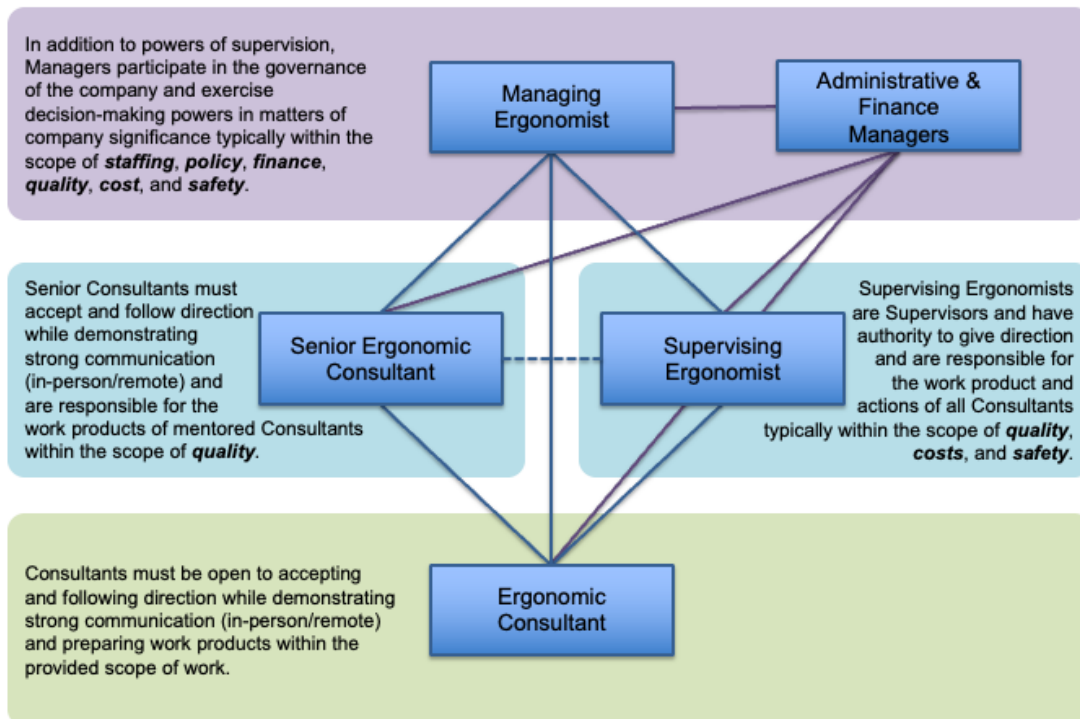




### 3.2. Functional Categories



### 3.3. ESA Employment Positions



## **4. Mission Statement**

We assemble solutions.

## **5. Corporate Philosophy**

The Options Incorporated (OI) corporate philosophy is the tangible embodiment of our culture and character. Complimentary to the Canadian College for the Certification of Professional Ergonomists (CCCPE) Code of Ethics for Ergonomists, a group of six (6) principles shape our unique business identity and permeate all professional activities to facilitate decision-making, brand management, and inspire workplace environments.

### **5.1. Principles**

#### **5.1.1. Truth**

While being sensitive to both emotions and reputations, honesty in all professional interactions without sugarcoating or embellishment is essential. No drama + no games = no doubt within our team.

#### **5.1.2. Trust**

It is important to recognize clients want to do business with a company they can trust. Within our OI Team, nurture loyalty to one another through honesty and integrity. Take issues directly to the source with care and consideration and do not talk behind others' backs. Refrain from gossip, practice self-control, do not judge, and readily acknowledge when mistakes are made.

#### **5.1.3. Transparency**

Open communication and accountability while being careful not to reveal commercially valuable information to clients and competitors. Recognize there may be times that require venting or discussion within the team but this is never done in front of the client; move to a safe place away from the client's scrutiny.

#### **5.1.4. Teamwork**

OI succeeds and fails as a team and in very real terms, “*we’re only as good as our last report*”. As professionals, the services we sell are invisible which means our collective external identity is each of us. All of us must therefore recognize this interdependency, as this is crucial to our success. Our individual work product is paramount and must never be completed in isolation without maximum effort. Everyone bears responsibility to motivate themselves and be committed to supporting each other to succeed within an inspired workplace environment while supporting our mission statement.

#### **5.1.5. Acceptance**

We do not always get what we want but we have to accept things and move on. Understand and accept you may not be aware of all influencing factors and let go. Find the silver lining and move forward without malice.

#### **5.1.6. Forgiveness**

No one is perfect and everyone makes mistakes; sometimes big mistakes with significant repercussions. This principle does not mean forget but is about acknowledgement; grieving the loss, disappointment, and/or emotional pain. Then change the behaviour, learn from it together as a team, let go and move forward without malice. Forgiveness is not a “free pass” and in rare instances the offender may be forgiven but the mistake is not.

### **5.2. Embrace Change**

Change is one of the few constants in life and a pre-requisite for both personal and professional growth; which can be difficult and stressful for some. Therefore, everyone must acknowledge this and embrace change by accepting the opportunities it creates. Although typically unplanned, change will always deliver a professional development opportunity and offer valuable experience by pushing the boundaries of individual comfort zones created unintentionally via assumption or complacency. A “macro” perspective greatly assists with the acceptance and understanding of change.

*“Happiness does not mean our problems magically disappear – it means that we are more able to deal with them.”*

Randy Taran

## 6. Code of Ethics for Ergonomists

All Options Incorporated (OI) employees must adhere to the Canadian College for the Certification of Professional Ergonomists (CCCPE) Code of Ethics for Ergonomists. This is a requirement as all client contracts and projects are managed by CCPE qualified ergonomists whom must ensure that the CCCPE Code of Ethics for Ergonomists is upheld.

Click on the below link to reference the CCCPE Code of Ethics for Ergonomists dated September 2, 2021.

<https://www.cccpe.ca/files/documents/CCCPE Code of ethics 2017-07-19 ENG.pdf>

## 7. Professional Client Boundaries

Professional boundaries are the legal, ethical and safety frameworks that protect both Options Incorporated (OI) and employees to promote safe working environments by minimizing potential liabilities.

Sometimes we encounter challenging client situations which make maintaining these boundaries difficult and may include but are not limited to, the following examples:

- offer your gifts;
- invites you to social functions;
- offers discounts on good or services;
- requests a favourable recommendation contrary to your analysis and/or professional opinion;
- requests to perform services outside the scope of work (SOW); and/or
- requests personal information be provided to an unrelated 3<sup>rd</sup> party service provider that OI has no professional/business relationship with.

Employees are prohibited from accepting gifts from clients, or benefitting from client perks. This policy will provide information to help employees to recognize and appropriately navigate situations such as these by providing a clear understanding of their role, professional code of ethics, and OI policies.

## 7.1. What is a Contractor?

There are multiple definitions for a contractor depending on the relevant organization i.e. WSIB, CRA, Public Health, OHS, etc. For the purposes of this policy, the corporate entity Options Incorporated (OI) is identified as the “Contractor” in the professional relationship with our clients. Individuals do not have professional relationships with supported OI clients via employment or contract for service agreements and therefore defined as OI employees – not legally defined as **contract** client staff or **contractors**.

## 7.2. What is a Gift?

Any item, money, hospitality or other benefit that is offered from a supported client. These can include but are not limited to items such as: gift baskets, free or discounted admission to sporting events, travel or conferences, client loyalty programs, client discounts on goods, club memberships, and/or access to on-site client facilities i.e. gym, childcare, hobby clubs.

### 7.2.1. Orbiting Influencers

**Tax Implications** – The fair market value of any client gifts attributed to an employee are taxable benefits and OI is required to include taxable benefits in payroll and reported on individual T4s.

**Liability Insurance & Code of Ethics for Ergonomists** – OI Errors and Omission (E&O) and General Liability Insurance coverages are conditional on employees maintaining individual professional designations of Canadian Certified Professional Ergonomist (CCPE) or Associate Ergonomist (AE) with the Canadian College for the Certification of Professional Ergonomists (CCCPE) and maintaining a member in good standing with the Association of Canadian Ergonomists (ACE). Therefore, everyone must adhere to the Code of Ethics of the College to avoid situations that potentially contravene Section 2.3 Integrity and Section 2.4 Conflict of Interest rules of practice to maintain member in good standing status and by extension, insurance coverages.

**Health and Safety** – Many gifts can create substantial Health and Safety risks i.e. playing a free round of golf with a client is not considered work\* in the event of an injury, and not subject to WSIB support. Similarly, OI has no policies or procedures to cover these scenarios i.e. the likelihood that someone in Management Group would be available and have situational awareness to facilitate a call for immediate assistance. In specific instances of harassment and/or violence, OI has no legal recourse to demand action if something occurred at a workplace controlled and/or service provided by an unrelated 3rd party service provider that OI has no professional relationship.

**Client Agreements\*** - OI is always contracted to support a very specific body of work that is typically outlined within a scope of work (SOW). Therefore, all client support activities must be directly related and link back to the execution of the SOW.

If anyone encounters a situation and are unsure if it should be considered under this policy, please ask a member of the Leadership Group.

## 8. Environmental Sustainability Policy

While acknowledging it is impractical to completely avoid environmentally harmful materials and activities, Options Incorporated (OI) does recognize the importance of reducing our environmental impact at the corporate level. In many instances, reducing our consumption of resources has an inverse and complimentary impact on our business operations.

For these reasons, we are committed to developing and practicing new solutions, which demonstrate our environmental stewardship. Focus is presently concentrated in three areas:

**Waste Reduction.** Our goal is to achieve a paperless office, which maximizes the use of portable electronic devices, e-mail and web-based applications to facilitate personal interactions both externally and internally;

**Waste Disposal.** OI's office recycles all waste paper, batteries, plastics, and printer cartridges. We always ensure that any hazardous waste is disposed of in approved facilities to minimize any negative environmental impact; &

**Emissions Reduction.** We strive to minimize our carbon footprint by reducing vehicle travel time required to meet with clients. Conference calls and virtual communication are promoted to replace short in-person meetings. When travel is unavoidable, everyone is encouraged to utilize public transportation whenever practicable, car-pool and/or geographically group appointments to maximize efficiencies and reduce emissions.

OI takes great pride in stimulating continual innovation and demonstrating a willingness to incorporate further initiatives to minimize our environmental impact.

## 9. Social Commitment Policy

Options Incorporated (OI) recognizes the interdependent relationship that exists between economic success and social progress. We believe strongly in the value of building and maintaining the social fabric of the communities in which we live and work. Encouraging overall health and wellness either via corporate involvement or through the direct participation of our employees is an ongoing area of focus.

Corporately, OI leads by example by offering select ergonomic related products and information services free of charge to the public, supporting staff activities/initiatives and sponsoring amateur sport. In turn, we encourage our employees to make healthy choices, be physically active and volunteer their energies and abilities directly with deserving community organizations.

### 9.1. Team Activity/Initiatives Guidance

Upon approval, employees may organize team events to incorporate but not be limited to a majority of the following goals:

- include group interaction;
- community involvement;
- promote healthy choices/lifestyle;
- develop team skills such as leadership, communication, decision-making, organization and planning; &
- develop team motivation and morale.

All activities must be planned in advance and require a minimum of 66% of employees committed to attending. Expenditures must be approved in advance of the activity and will be reimbursed to the organizers via the Expense Form (F2) with original receipts.

# 10. Brand Management Policy

Requiring years to build but only hours to destroy, the Options Incorporated (OI) corporate reputation is the foundation of our brand recognition which distinguishes us from our competitors. Our primary brand management goals are **consistency** and **substance**.

The visual elements of **consistency** include a common look and feel that permeates all forms of communications ie. reports, marketing materials, website, e-mails, presentations, etc. The less obvious element is a systems-based thinking methodology that nurtures predictability of action ie. Professional Thinking.

The concept of **substance** is more challenging because it’s reliant upon soft skills. It drives authentic client interactions (both in-person and virtual) to foster confidence, trust, and value beyond the contracted service.

Each of us has an essential marketing role because the services we sell are invisible. As a result, we rely on individual client interactions to evoke positive emotional “customer experiences”. With this in mind, nearly every act we perform, every word we utter, holds the opportunity to promote OI. **Every act is a marketing act.**

## 10.1. Primary Graphic

The overarching visual identity for OI is our “primary graphic” (Figure 1). This is more than a logo because it comprises a number of visual elements to create a distinctive brand recognition asset. This graphic must not be manipulated in any way nor used without the written consent of the Management Group.



Figure 1

## 10.2. Brand Colour Codes

The Options Incorporated (OI) colour scheme utilizes a seven (7) colour palette in all graphic design.

Value	Orange	Light Blue	Blue	Green	Red	Yellow	Purple
R	255	93	0	0	255	255	153
G	153	135	51	153	0	255	0
B	0	218	153	0	0	0	204



# 11. Information Systems - Acceptable Use Policy

The purpose of this policy is to outline the acceptable use of information systems to protect both employees and Options Incorporated (OI). The Information Systems policy expands upon the Professional Responsibilities section of the CCCPE Code of Ethics for Ergonomists. Inappropriate use exposes OI to risks including virus attacks, data security breaches, compromise of network systems and services, and legal issues.

Information systems refer to proprietary websites, e-mail, computers, electronic storage, force gauges, cameras, portable routers/modems, networks, mobile devices etc. These resources are the property of OI and are provided as business tools for the purpose of completing assessments, and maintaining essential business communications with clients, suppliers, co-workers and contractors of OI in the performance of their contractual obligations.

Employees shall undertake to protect these resources from loss, damage and/or unauthorized access by any other persons and understand that they are responsible for replacing devices and/or re-programming costs at their own expense should loss or damage occur due to negligence.

There is **no expectation of privacy** related to the use of OI information systems. All resources are closely monitored to identify security vulnerabilities and unauthorized access.

All files, documents, inventions, forms, memos, processes, photos, logos, etc. that are worked on using these resources originating from contracts with OI, remain the property of OI and are to be used only in the conduct of OI business. OI reserves the right to retrieve and/or access these resources at any time without notice. Employees agree to surrender all devices and/or access immediately upon request and/or termination of employment.

The Ontario distracted driving law makes it illegal for drivers to talk, text, type, dial and/or e-mail using cell phones and other hand-held communication and entertainment devices. Only hands-free use of these devices is permitted. The law also prohibits the viewing of display screens unrelated to driving such as laptop computers.

Employees understand that unlawful usage of these resources may create negative publicity and expose OI to significant liabilities. Additionally, employees acknowledge that these resources must not be used knowingly to violate the laws and regulations of Canada or United States, any other country, any province, state, city or local jurisdiction in any way. OI will cooperate with legitimate law enforcement activities initiated by illegal usage.

Lastly, employees understand failure to follow any of the listed terms and conditions or if found to have misused the resources in any manner may result in revocation of privileges, progressive discipline, termination of employment, and/or criminal charges being filed with the appropriate authorities. Should a resource become damaged, lost, stolen, or suspected of being compromised either physically or electronically, consultants shall advise the **Administrative Manager immediately via phone at: 519-803-3457 and e-mail: [cevans@oiweb.com](mailto:cevans@oiweb.com).**

## **11.1. Utilizing Client Information Resources**

All employees must be aware and extra vigilant to avoid utilizing client resources to conduct personal and/or OI specific activities. Using client communication devices, social media, e-mail addresses, electronic storage, scanners and/or computing devices for anything other than completing OI contractual obligations cannot occur. Removal off-site of client assets that may include but not limited to computing devices, software, tools, electronic storage, and/or manuals is strictly forbidden.

Exceptional circumstances must be brought to the attention of the appropriate OI Manager and will be considered/approved on a case-by-case basis in consultation with the affected client.

## **11.2. Information Security Procedures**

For consulting purposes, personal information includes any opinion, evaluations, and/or recommendations about an identifiable individual. Client information is always confidential and includes but not limited to trade or business secrets, procedures, formulae, designs and design methods, other methodologies, medical records, techniques, business plans and policies, sales and marketing information, training materials, business records, intellectual property, intellectual technology, client contracts, reports, employee contracts, proposals and any Information not typically disclosed to the public.

All client and personal information saved on OI computers, electronic storage, cameras, and/or hand-held devices must be safeguarded via encryption and/or passwords/passcodes.

### **11.2.1. Client/Public Networks & Hardware**

OI devices will not be physically connected to client and/or public hardware for battery charging, Internet access, and/or file transfer purposes. Similarly, OI devices will not utilize client and/or public WiFi networks while onsite at a client or working remotely in a public space.

When Internet connectivity is required while onsite supporting a client or remotely in a coffee shop, use OI iPhone to activate a "Personal Hotspot". Pair the iPhone with an OI device as required - immediately deactivate "Personal Hotspot" upon completion of the specific task.

### **11.2.2. Social Media**

Social media includes any OI/client hosted or non-hosted online tools used to share content and profiles, such as personal web pages, message boards, networks, communities, and social networking websites, including, but not limited to, Facebook, Instagram, Snapchat, Reddit, Google+, Digg, Flickr, X, LinkedIn, TikTok, Pinterest, YouTube, client specific chat, and web blogs. This is a constantly evolving area; therefore, the lack of explicit reference to a specific site or type of social media does not limit the application of this policy.

Employees are encouraged to talk about OI on their personal social media accounts and share their passion for what they do in an appropriate and respectful manner. However, everyone must be vigilant to avoid sharing information or rumours known to be false about OI, clients, suppliers, individuals working on behalf of OI, and/or competitors. Caution must be exercised to ensure client and/or personal information is not shared.

Employees must clearly brand their social media posts as personal and purely their own opinions. Anyone personally vlogging/blogging related to their work or subjects associated with OI must clearly state that they're not speaking on behalf of OI. It is advised to include a disclaimer such as "The postings on this site/video are my own and do not necessarily reflect the views of Options Incorporated."

Participating in social media is not a duty inherent in the positions of Managing Ergonomists, Supervising Ergonomists, Senior Ergonomic Consultants, Ergonomic Consultants, or Interns. Therefore, employees are expected to ensure that any personal activity is not facilitated via OI/client resources or during work hours.

OI is not responsible or liable for social media postings.

### **11.2.3. Photos and Video**

When physically onsite and with client approval, employees may only take photos and/or video specifically for data collection purposes in the completion of ergonomic assessments. All used, unused photos and/or video must carefully be deleted from all devices upon completion of the relevant assessment reports.

### **11.2.4. Report Formatting**

To mitigate potential document manipulation, all softcopy client reports will be submitted in PDF format only. Editable softcopy files (Word, Excel, PowerPoint), hardcopy investigative notes, and/or raw data must never be submitted to the client or third parties. All data collected during an investigation must be maintained on file in accordance with record keeping guidance of the Professional Responsibilities section of the CCCPE Code of Ethics for Ergonomists.

Client reports containing photos require further attention to safeguard personal or client information. Photos may require editing to prevent identification and/or disclosure of proprietary client information. All photos must be embedded in softcopy PDF format and unused photos and/or video must carefully be deleted from all devices.

### **11.2.5. Encryption**

All OI computers have an encrypted “OI Work” folder on the desktops and hard drives via Apple FireVault. Lockdown Mode is now available in iOS 16+, iPadOS 16+, and macOS Ventura in extreme circumstances of targeted cyberattack.

### **11.2.6. Passwords**

Passwords must not be shared and treated as confidential OI information. In rare circumstances when a password must be communicated, never include a password and login together using the same communication format or within context. Do not save passwords and/or usernames when prompted by web browsers or operating system software.

The Administrative Manager generates and centrally manages passwords to meet or exceed the following guidelines:

- contain a minimum of eight (8) alphanumeric characters;
- contain both upper and lowercase letters;
- contain a minimum of one (1) number (ie. 0-9); &
- contain a minimum of one (1) special character (ie. !&%^).

All proprietary websites, e-mail, computers, portable routers/modems, networks, and hand-held devices are restricted access requiring logins and passwords/passcodes.

Only OI electronic storage devices including external hard drives, USB keys, CD-Rs, and/or Flash cards with password protection are authorized to store client and personal information. These storage devices may only be used with OI computers to mitigate potential corruption.

Upon employee departure, passwords to proprietary websites, networks, and e-mails are changed as a matter of routine exit administration.

### 11.2.7. Software Installation and Updates

The **Administrative Manager** is responsible to store in a secure, central location all original software licenses, files, and documentation upon receipt of all new software, including copies of completed registration cards. This includes bundled software acquired through hardware purchases.

Only the **Administrative Manager** shall designate those employees authorized to install and/or update licensed software on OI computers and/or iPhones.

### 11.2.8. Clean Desk

Employees must always exercise caution when using client and/or personal information in their workspace. Awareness of desktop and monitor sight lines is essential in open concept, home offices, and transient workspaces. Equally important is verbal communications both in-person and via phone related to voice volume and conversation content.

All computers must be locked or logged-off and hardcopy materials removed from the desktop and physically secured when the workspace is unoccupied for any period of time.

Computers must be shut down completely at the end of the workday. In the absence of an applicable client policy, hardcopy materials, laptops, and electronic storage devices are physically secured overnight and extended absences.

Printouts containing client and/or personal information should be immediately removed from printers and fax machines. Whiteboards erased as a matter of routine and disposal of hardcopy materials in accordance with client policies – documents will be shredded in the absence of an applicable policies.

### 11.2.9. Settings – iPhones and Computers

**Display & Brightness, Auto-Lock** - set to *"1 Minute"* on all iPhones.

**Face ID & Passcode** - activated.

**WiFi/Network** - set to *"Ask to Join Networks"* to prevent joining unknown networks automatically.

**Bluetooth** - set to *"Off"* on all Options Incorporated capable devices. The *"Discoverable"* box will be unchecked on all computers to remain hidden. Bluetooth may be activated to complete specific tasks however it will be deactivated upon completion.

**Cellular** - set *"Call on Other Devices"* to *"Off"*.

**Personal Hotspot** - set to *"Off"* but activates as required and immediately deactivate upon completion of the specific task.

**Notifications** - set *"Show Previews"* to *"When Unlocked"* to avoid displaying text messages on the iPhone Lock Screen.

**Focus, Driving Focus** - set *"People"* to *"Silence Notification From"* and *"Turn On Automatically"* set to *"While Driving"*.

**General, AirDrop** - set to *"Receiving Off"*.

**General, Handoff** - set to *"Off"*.

**Siri & Search** - set ASK SIRI *"Listen for 'Hey Siri'"* and *"Press Home for Siri"* to *"Off"*.

**Privacy & Security, Analytics** - set *"Share iPhone Analytics"* and *"Share iCloud Analytics"* to *"Off"*.

**Privacy & Security, Advertising** - set *"Personalized Ads"* to *"Off"*.

**Passwords, Password Options** - set *"AutoFill Passwords"* to *"Off"*.

**Photos** - set *"iCloud Photos, My Photo Stream, and Shared Albums"* all to *"Off"*.

**Sharing** - limited to *"Printer Sharing"* on all Options Incorporated computers.

**Energy Saver** - Computer sleep set to *"6 mins"* and Display sleep set to *"3 mins"* for both Battery and Power Adaptor settings on all Options Incorporated computers.

**Security & Privacy, General** - Require password set to *"1 minute"* after sleep or screen saver begins on all Options Incorporated computers.

**Security & Privacy, FileVault** - set to *"On"* and set-up on all Options Incorporated computers. When enabled, the entire contents of the hard drive are encrypted. When the computer is powered off, the drive's data is fully unrecoverable without a password. Additionally, this facilitates the use of Find My Mac to wipe the computer hard drive remotely in a matter of seconds if lost or stolen.

**Security & Privacy, Firewall** - set to *"On"* and set-up on all Options Incorporated computers to prevent unauthorized applications, programs, and services from accepting incoming connections.

**Locations Services** under Privacy is restricted to Health and Safety related applications on wireless devices but disabled on all computers.

**Backup** - all Options Incorporated computers occur hourly for the past 24 hours, daily for the previous month and weekly for all previous months. Backups are encrypted.

**iCloud** - *"Find My iPhone/Mac"* is activated on all wireless devices and computers. *"iCloud Backup"* is *"Off"* and *"iCloud Drive"* is *"Off"*. No documents, photos, or backup data will be stored in iCloud.

## 12. Credit Card Policy

Although an Options Incorporated (OI) credit card may be issued in an employee's name, it remains the property of OI and is solely provided for the purpose of performing an employee's contractual obligations. All products and services purchased via the credit card are the sole property of OI.

Employees accept full personal responsibility for the safekeeping of their credit card, and that absolutely no one, other than them, is permitted to use their assigned credit card. Should the credit card become damaged, lost, stolen or suspected of being compromised either physically or electronically, the employee shall advise the **Administrative Manager immediately via phone at: 519-803-3457 and e-mail: [cevans@oiweb.com](mailto:cevans@oiweb.com).**

Employees understand they will be making financial commitments on behalf of OI and endeavor to obtain fair and reasonable prices. They agree that the credit card is for business purposes only and that personal use of the card is strictly prohibited and non-company related expenses, unauthorized purchases, or personal use including obtaining personal loans or credit by using the credit card as a financial reference is not authorized.

There is no expectation of privacy as all credit card activity is closely monitored. OI reserves the right to retrieve the credit card at any time without notice and the employee agrees to surrender it immediately upon request and/or termination of employment for any reason.

Employees understand that unlawful usage may create negative publicity and could expose OI to significant legal liabilities. Additionally, employees acknowledge the credit card must not be used knowingly to violate the laws and regulations of Canada or United States, any other country, any province, state, city or local jurisdiction in any way. OI will cooperate with legitimate law enforcement activities initiated by illegal usage.

Lastly, employees understand failure to follow any of the listed terms and conditions or if found to have misused the device in any manner may result in revocation of privileges, progressive discipline, termination of employment, and/or criminal charges being filed with the appropriate authorities.

# 13. Health and Safety

## 13.1. Health and Safety Policy



Options Incorporated (OI) is profoundly committed to the health and safety of its employees and as such, their protection from injury or occupational disease is a major continuing objective. Everyone will make all reasonable efforts to provide a safe, healthy work environment. Therefore, all Managing Ergonomists, Supervising Ergonomists, Senior Ergonomic Consultants, Ergonomic Consultants, and Interns must be dedicated to the continuing objective of reducing the risk of injury.

We strive to create an informed culture, including awareness of the various factors that potentially impact safety. An integral component of OI's unique organization and management practice, the OI Safety Culture is a shared care and concern for hazards, realistic and adaptable protection from hazards, and ongoing evaluation to promote organizational learning.

OI, as employer, is ultimately responsible for health and safety of all employees. As President, I, Kirsti MacAulay, give you my personal promise that every reasonable precaution is taken for your protection.

Managing and Supervising Ergonomists are accountable for the health and safety of Senior Ergonomic Consultants, Ergonomic Consultants, and Interns under their supervision. Managing and Supervising Ergonomists are responsible to ensure that machinery and equipment are safe and that Senior Ergonomic Consultants, Ergonomic Consultants, and Interns work in compliance with established safe work practices and procedures. Senior Ergonomic Consultants, Ergonomic Consultants, and Interns will receive adequate training in their specific work tasks to protect their health and safety.

All employees must protect their own health and safety by working in compliance with the law and safe work practices and procedures established by supported clients. In the absence of client safety policies, the OI safety policies will be utilized in accordance with the Occupational Health and Safety Act (OHSA).

A commitment to health and safety must form an integral aspect of our daily activities as it is in the best interest of the entire OI team.

In accordance with the OHSA, OI will review the health and safety policy and program annually.



## 13.2. Duties of Employers

An Ontario employer, who is covered by the OHS Act, has a range of legal obligations, including the obligations to:

- instruct, inform, and supervise workers to protect their health and safety;
- assist in medical emergency by providing any information - including confidential business information - to a qualified medical Practitioner and other prescribed persons for the purpose of diagnosis or treatment;
- appoint competent persons as supervisors. “Competent person” is a defined term under the Act. A “competent person” is defined as one who must:
  - be qualified - through knowledge, training, and experience - to organize the work and its performance;
  - be familiar with the Act and the regulations that apply to the work being performed in the workplace; &
  - know about any actual or potential dangers to health and safety in the workplace.
- inform a worker, or a person in authority over a worker about any hazard in the work and train that worker in the handling, storage, use, disposal, and transport of any equipment, substances, tools, material, etc;
- help joint health and safety committees and health and safety representatives to carry out their functions;
- not employ or permit persons, who are under the prescribed age for the employer’s workplace to be in or near the workplace;
- take every precaution reasonable in the circumstances for the protection of a worker;
- post in the workplace a copy of the OHS Act, as well as explanatory materials prepared by the Ministry of Labour that outlines the rights, responsibilities, and duties of workers. This material must be in English and majority language in the workplace;
- in workplaces in which more than five workers are regularly employed, prepare a written occupational health and safety policy, review that policy at least one a year and set-up and maintain a program to implement it;
- post a copy of the occupational health and safety policy in the workplace, where workers will be most likely to see it;
- provide the joint health and safety committee or health and safety representative with the results of any occupational health and safety report that the employer has. If the report is in writing, the employer must also provide a copy of the parts of the report that relates to occupational health and safety;

- advise workers of the results of such a report. If the report is in writing, the employer must, on request, make available to the workers copies of those portions that concern occupational health and safety;
- ensure that every part of the physical structure of the workplace complies with the load requirements prescribed in the applicable Building Code provisions, any prescribed standards and sound engineering practice;
- prepare policies with respect to workplace violence and workplace harassment and review them once a year; &
- regardless of how many workers they employ, develop programs supporting workplace harassment and workplace violence policies and include measures and procedures for workers to report incidents of workplace harassment and workplace violence, and set-out how the employer will investigate and deal with incidents or complaints.

### **13.3. Duties of Supervisors**

The Act sets out certain specific duties for workplace supervisors. A supervisor must:

- ensure that a worker complies with the Act and regulations;
- ensure that any equipment, protective device or clothing required by the employer is used or worn by the worker;
- advise a worker of any potential or actual health or safety dangers known by the supervisor;
- if prescribed, provide a worker with written instructions about the measures and procedures to be taken for the worker's protection; &
- take every precaution reasonable in the circumstances for the protection of workers.

### **13.4. Duties of Workers**

Workers also have several general duties under the Act. A worker must take responsibility for personal health and safety insofar as they're able. Under the Act, a worker must:

- work in compliance with the Act and regulations;
- use or wear any equipment, protective devices or clothing required by the employer and/or client;
- report to the employer or supervisor any known missing or defective equipment or protective device that may endanger the worker or another worker;

- report any hazard or contravention of the Act or regulations to the employer or supervisor;
- not remove or make ineffective any protective device required by the employer or by the regulations other than in circumstances specified below. The only circumstance in which a worker may remove a protective device is where an adequate temporary protective device is provided in its stead. Once there is no longer a need to remove the required device or to make it ineffective, it must be replaced immediately;
- not use or operate any equipment or work in a way that may endanger any worker; &
- not engage in any prank, contest, feat of strength, unnecessary running or rough and boisterous conduct. Racing powered hand trucks in a warehouse or seeing who can pick up the most boxes are examples of unlawful conduct.

### **13.5. Health and Safety Representative**

Workplaces with more than five (5) but less than 20 employees must have a health and safety representative. Like joint health and safety committee members, the representative is committed to improving health and safety conditions in the workplace.

Employees are defined as anyone who is employed for a period that exceeds three months and may include permanent full-time staff, permanent part-time staff, contract staff, and managers.

The health and safety representative must be chosen by the workers who do not exercise managerial functions and who will be represented by the representative. The representative is elected to a minimum one (1) year term, does not require special training or certification and, like committee members, is entitled to take paid time to attend inspections and investigations.

For information on the role and responsibilities of the health and safety representative, please click the below link.

<https://www.ontario.ca/page/guide-health-and-safety-committees-and-representatives#section-4>

### **13.6. The Right to Refuse Work**

Workers have the right to refuse work that they believe is dangerous to either their own health and safety or that of another worker in the workplace. They must, however, notify their supervisor or employer immediately and provide a detailed explanation as to why.

The affected supervisor or employer must investigate the situation immediately, in the presence of the worker and one of the following:

- the health and safety representative, in workplaces where there is no joint committee; or
- another knowledgeable and experienced employee.

The refusing worker must remain in a safe place that is as near as reasonably possible to their workstation, and remain available to the supervisor or employer for the purposes of the investigation, until the investigation is completed. This is known as the **first stage** of a work refusal. If the situation is resolved at this point, the worker will return to work.

The worker can continue to refuse the work if they have reasonable grounds for believing that the danger that caused the work refusal continues. At this point, the **second stage** of a work refusal begins with the notification of a “Ministry of Labour” inspector by either the worker or employer.

If the inspector is satisfied that the worker has the legal right to refuse unsafe work and that the **first stage** investigation has been properly completed, the inspector will attend to the workplace to investigate the refusal. If there is a health and safety representative or a knowledgeable and experienced employee present, they will also be consulted as part of the inspector’s investigation.

While waiting for the inspector's investigation to be completed, the worker must remain in a safe place that is near as reasonably possible to their workstation and available to the inspector for the purposes of the investigation, unless the employer assigns some other reasonable work during normal working hours. If no such work exists, the employer can give other directions to the worker.

The inspector must decide whether the circumstance that led to the work refusal is likely to endanger the worker (or another person). The inspector's decision must be given, in writing, to the worker, the employer, and the health and safety representative. If the inspector finds that the circumstance is not likely to endanger anyone, the refusing worker is expected to return to work.

## 13.7. Safety Training

Employees must clearly understand the safety policies outlined in the enclosed Annexes and complete the OI eLearning Safety Training Module, Workplace Hazardous Materials Information System (WHMIS) 2015, and client specific PPE training.

Although OI does not handle hazardous material or controlled products directly, employees may come in contact with these materials at client worksites. A link to the Canadian Centre for Occupation Health and Safety (CCOHS) WHMIS 2015 Hazard Classes and Categories may be referenced on the Health & Safety page of the Lunch Room.

## 13.8. Safety Communication Procedures

These procedures work in conjunction with the Summoning Immediate Assistance Procedures outlined in section 14.3.3 of the Workplace Harassment and Violence policy, the Emergency Signal and Code Word Procedures outlined in section 15.1, and the Home Office Communication Procedures outlined in section 16.3.2.

Employees perform iPhone function/connectivity tests and record support of their daily scheduled hours via the “clock-in/out” function of the When I Work (WIW) employee scheduling software - typically whenever they arrive and depart a client, Head Office, and/or start and finish working remotely.

The home office presents a unique employment situation requiring additional communications in accordance with the Home Office Communication procedures outlined in section 16.3.2.

### 13.8.1. Wireless Dead Zone Communication Procedures

Upon receipt of a client request to provide support in a known wireless signal dead zone, the **Administrative Manager** is notified as soon as possible to review date/time and estimated onsite time. This review confirms management is available to monitor and potentially assist for the duration of the onsite support.

On receipt of management approval, the supporting employee will complete a text or voice call check-in upon arrival and check-out on departure of the known client wireless signal dead zone. Management will closely monitor the affected mobile phone via “Find My iPhone” and ensure direct land line contact numbers are available to facilitate emergency communications.

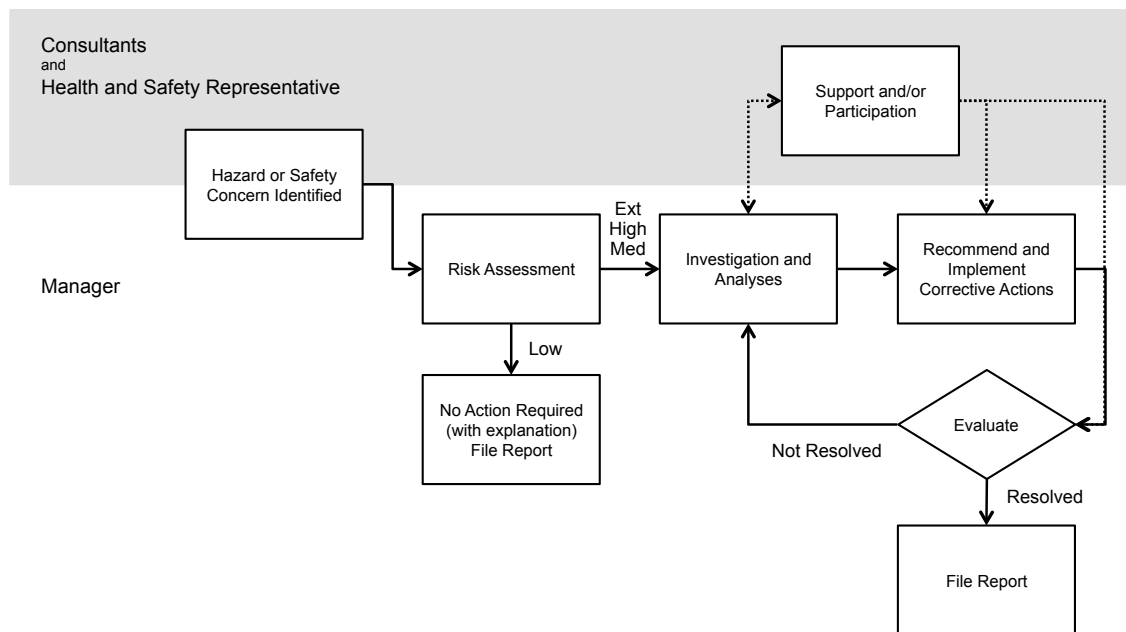
To create redundancy, employee situational awareness (SA) is equally critical when providing support in a known client wireless dead zone. Utilize the SA Interior strategies to identify alternative phones (land lines), exits, safe areas, and/or emergency buttons/panic alarms.

Known client wireless signal dead zone are identified on the Health & Safety page of the Lunch Room with supporting contact numbers.

## 13.9. Hazard Identification and Investigation Policy

Hazards are any existing or potential condition that can lead to injury, illness or death to people; damage to or loss of system, equipment, or property; and/or damage to the environment. Hazard identification is a proactive method regarding something that **may happen** in the future if the circumstances of the operation are not change.

### 13.9.1. Hazard Identification Process



### 13.9.2. Hazard Investigation Procedure

Everyone has a responsibility to report a potential hazard. This facilitates investigation of the safety issue before an accident occurs. The potential hazard is reported to the **Administrative Manager** via e-mail using the following headings:

- location/area of operation;
- background summary;
- task being performed including specific conditions/circumstances;
- explain potential for hazard or failure;
- what mitigation is currently in place to prevent this hazard;
- if no action is taken, what is a realistic worst-case outcome; &
- recommendations to mitigate the hazard.

The **Administrative Manager** shall acknowledge receipt of the hazard report and initiate an investigation. The investigation may involve working with/within the staff/procedures of a client location and therefore subject to their approval. There is no guarantee of client co-operation and/or participation.

Initially, the **Administrative Manager** shall conduct a risk assessment for the reported hazard by assessing the realistic worst-case outcome if the situation is left uncorrected, using the following table

Likelihood	Consequences				
	Insignificant 1	Minor 2	Moderate 3	Major 4	Catastrophic 5
<b>A (certain)</b>	H	H	E	E	E
<b>B (likely)</b>	M	H	H	E	E
<b>C (moderate)</b>	L	M	H	E	E
<b>D (unlikely)</b>	L	I	M	H	E
<b>E (rare)</b>	L	L	M	H	H

This table will determine the risk level of the hazard, taking into consideration how likely it is to occur, and what the consequences will be if it does occur.

When determining the likelihood of a potential incident, the investigating manager shall consider the frequency at which the incident is likely to occur.

**A** = the event is likely to happen on a weekly basis, or more frequently

**B** = the event is likely to happen on a monthly basis

**C** = the event is likely to happen once every six (6) months

**D** = the event is likely to happen once per year

**E** = the event is likely to happen less frequently than once per year

In order to determine the consequences of the identified hazard, the **Administrative Manager** shall use the following criteria to determine what level should be assigned. When an identified hazard could fall into one or more levels, the **Administrative Manager** shall use the more serious level.

**1 = - minor Inconvenience**

- no injury or illness
- no effect on company reputation
- involves the use of internal resources to address the event
- equipment/facility damage <\$100

**2 = - minimal time lost addressing situation**

- First Aid required, no time taken off work
- minimal harm to company reputation
- involves the use of internal resources to address the event
- equipment/facility damage <\$500

**3 = - moderate time lost addressing situation**

- numerous minor injuries/illness or time-off work required (<7 days)
- equipment/facility damage <\$1000
- some harm to company image
- involves the use of internal and external resources to address the event (for example, carpenters and painters hired to repair damage)

**4 = - major time lost addressing situation**

- severe injury or illness (>7 days off work)
- equipment/facility damage <\$5000
- involves first responders (police, fire, ambulance)
- considerable harm to company image

**5 = - complete shutdown of operation**

- death of one or more persons
- extensive injuries to multiple persons
- equipment/facility damage >\$5000
- considerable harm to company image



Depending on the risk level assigned, the following actions shall be taken by the **Administrative Manager**:

**E** – Extreme – Activity identified in the hazard report shall stop immediately until short-term corrective actions are implemented. The Management Group and Health and Safety Representative are informed.

**H** – High – The **Administrative Manager** must complete an initial investigation and short-term corrective action implementation within seven (7) days.

**M** – Medium – The investigation and analysis shall be completed within 30 days.

**L** – Low – The investigation and analysis shall be completed within 60 days.

The **Administrative Manager** must ensure that all inquiries and analyses are carried out within the timeframe established by the risk assessment. The investigation will focus on identifying the root causes of the hazard, both operationally and organizationally. The analysis will result in recommended corrective actions to mitigate the identified hazard.

The goal is to eliminate unnecessary risk, while finding effective ways to mitigate necessary risk through safety devices, procedural changes, training, limiting exposure, increasing supervision, etc. Some hazards, particularly those with a risk level of “low” assigned to them, may not have corrective actions to be implemented; the investigation may determine that the present level of risk is acceptable.

If it is determined during the initial risk assessment that a hazard is “Low”, the **Administrative Manager** may exercise the right to not conduct a full investigation. In this case, they shall attach an explanation as to why a full investigation is not required to the hazard report before closing the file.

The final investigative report shall be submitted to the OI President in memorandum format with signed statements, memoranda, or other supporting documentation and forms of evidence attached.

### **13.9.3. Recommended Corrective Actions**

The **Administrative Manager** will present the results to the Management Group, Health and Safety Representative, and the employee who originally identified the hazard. It's optimal but not necessary to reach a consensus on the recommended corrective actions to ensure due diligence. The investigation will be made available to all employees for review.

An evaluation of the effectiveness of the corrective actions will be conducted six (6) months after implementation. A re-assessment of the root causes may be necessary if the implemented corrective actions are proven ineffective.

## **13.10. Accident Investigation Policy**

OI will thoroughly investigate all accidents/illness resulting in work related injuries and/or illnesses requiring treatment by a health care practitioner, or which prevent an employee from completing their normal duties. An essential component of due diligence, these investigations are conducted to determine corrective actions to eliminate or control the causes and mitigate a potential reoccurrence.

The investigation may involve working with/within the staff/procedures of a client location if the accident occurred at their facility. There is no guarantee of client co-operation and/or participation.

### **13.10.1. Definitions**

**Minor Injury** – means an injury that occurs during the course of an employee’s work, but does not require outside medical attention. Examples include: bruises, minor abrasions and lacerations etc., treated by first aid only.

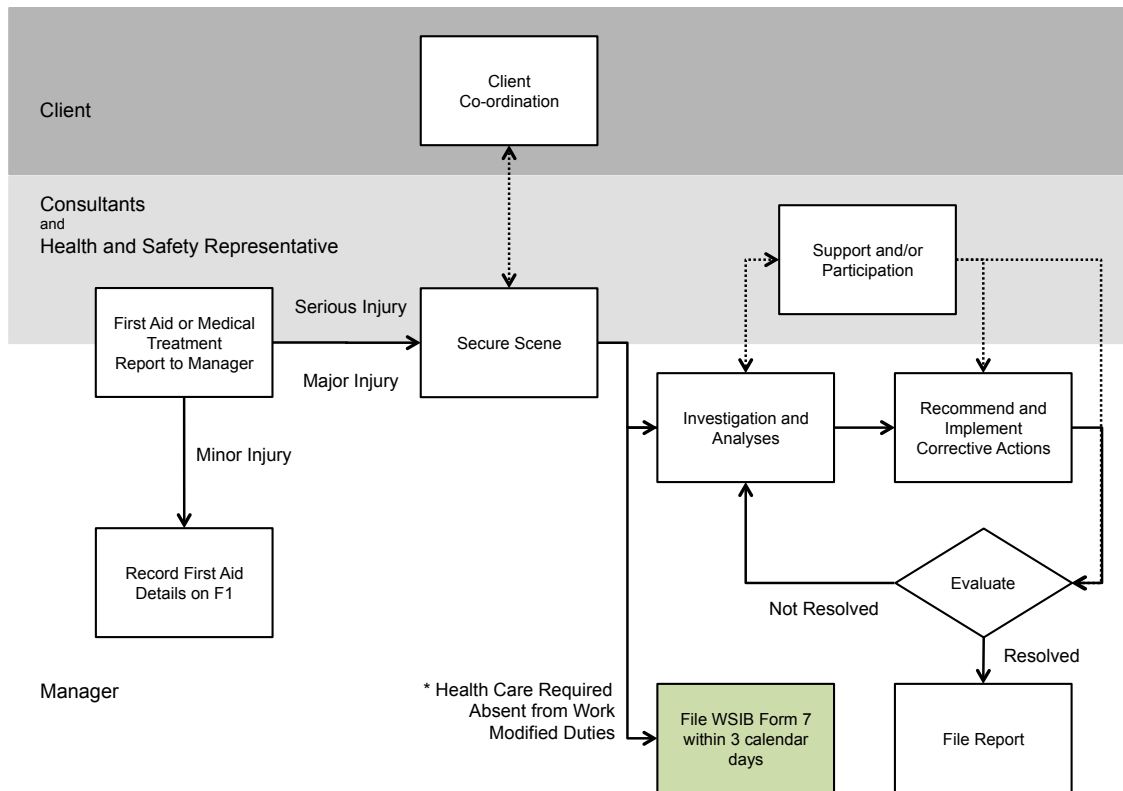
**Serious Injury** – means an injury that requires medical attention beyond first aid, necessitating sending an employee to an outside medical facility for observation and/or treatment. Examples include: open laceration requiring sutures, foreign object in eye, severe muscle strains, etc.

**Major Injury** – means an injury, which requires outside medical attention and may also involve restricted activity, or become a lost time injury, if a consultant is advised by a physician not to report for their scheduled shift. Examples include: acute back strain, fracture of finger or toe, amputation of a finger or toe, severe foot injury, etc.

**Health Care** - WSIB defines health care to include services provided at hospitals and health facilities and services that can only be provided by one of the following health care professionals: chiropractor, physician, physiotherapist, registered nurse (extended class), or dentist.

**First Aid** – WSIB defines first aid to be one-time treatment or care and any follow-up visit(s) for observation purposes only. First aid includes, but is not limited to: cleaning minor cuts, scrapes, or scratches; treating a minor burn; applying bandages and/or dressings; applying a cold compress, cold pack, or ice bag; applying a splint; changing a bandage; and dressing after a follow-up observation visit.

## 13.10.2. Accident Investigation Process



The investigation will focus on identifying the root causes of the accident, both operationally and organizationally. The analysis will result in recommended corrective actions to eliminate or control the causes and mitigate a potential reoccurrence.

The final investigative report shall be submitted to the OI President in memorandum format with signed statements, memoranda, or other supporting documentation and forms of evidence attached. The **Administrative Manager** will present their report to the Management Group, Health and Safety Representative, and injured employee. Although optimal, a consensus on the recommended corrective actions is not required to ensure due diligence.

An evaluation of the effectiveness of the corrective actions will be conducted six (6) months after implementation. A re-assessment of the root causes may be necessary if the implemented corrective actions are proven ineffective.

### 13.10.3. Employee Responsibilities

- immediately provide First Aid or seek medical treatment as appropriate;
- report all accidents/illness to the **Administrative Manager** immediately, regardless of severity;
- secure the accident scene for investigation by the **Administrative Manager**;
- the **Administrative Manager** will attend the scene of the accident to initiate their investigation and collect photographs, drawings, measurements, and/or equipment/materials involved before anything is altered;
- the **Administrative Manager** will identify and interview witnesses to the accident and those familiar with the conditions immediately before and after the accident; &
- report the injury within guidelines to the WSIB.

### 13.10.4. Employer Responsibilities

On the day of the accident, OI must:

- provide and pay for immediate transportation to a hospital, health professional office/clinic or the employee's home (if necessary); &
- pay full salary for the day on which the injury occurred (WSIB benefits begin the next working day after the injury occurs).

OI must report a work related accident/illness to the Workplace Safety and Insurance Board (WSIB) if they learn that an employee requires health care and/or:

- is absent from regular work;
- earns less than regular salary for regular work (only working partial hours);
- requires modified work at less than regular salary; &
- following the date of the work related accident/illness, the employee does not receive health care but requires modified work at regular pay for more than seven (7) calendar days.

The WSIB Form 7, Employer's Report of Injury/Disease is submitted to report a workplace injury/illness within three (3) calendar days after learning of the injury. The completed Form 7 has to be received by the WSIB within seven (7) business days subsequent to learning of the workplace injury or illness. Once submitted, a copy of the

Form 7 must be provided to the injured employee (including all attachments) and another kept on record.

It is not necessary to complete a Form 7 for Minor Injuries requiring First Aid from an in-house/worksite health care professional or trained first aider. However, a record of the First Aid details will be added to the Consultant's F1. Click the following link to access the online eForm 7 report.

[https://www.wsib.ca/sites/default/files/2021-04/0007a\\_0.pdf](https://www.wsib.ca/sites/default/files/2021-04/0007a_0.pdf)

WSIB contact information:

Workplace Safety and Insurance Board  
200 Front Street West  
Toronto, ON M5V 3J1  
Local Fax: 416-344-4684  
Toll-Free Fax: 1-888-313-7373

## 14. Workplace Harassment and Violence

### 14.1. Workplace Harassment Policy

Options Incorporated (OI) is committed to providing a work environment in which all workers are treated with respect and dignity.

OI does not tolerate harassment in the workplace perpetrated by or against workers, supervisors, clients, or other third parties. Everyone is expected to uphold this policy and will be accountable to the employer.

**Harassment** - means engaging in a course of vexatious comment or conduct against a worker in a workplace that is known or ought reasonably to be known to be unwelcome. This may include, but is not limited to, bullying, teasing, intimidating or offensive jokes or innuendos, displaying or circulating offensive pictures or materials, offensive or intimidating communications (texts, e-mails, phone calls), inappropriate staring, isolating or making fun of a worker because of gender identity. Sexual harassment means:

- engaging in a course of vexatious comment or conduct against a worker in a workplace because of sex, sexual orientation, gender identity or gender expression, where the course of comment or conduct is known or ought reasonably to be known to be unwelcome; or
- making a sexual solicitation or advance where the person making the solicitation or advance is in a position to confer, grant or deny a benefit of advancement to the worker and the person knows or ought reasonably to know that the solicitation or advance is unwelcome.

**Workplace** - means any place where business or work-related activities are conducted. It includes, but is not limited to, the physical work premises, work-related social functions (ie. parties, golf games, etc.), work assignments outside the Company's offices, work-related travel and work-related conferences or training sessions.

This policy is not intended to limit or constrain the reasonable action or conduct by an employer, manager, or supervisor that is part of their normal work function. Examples could include changes in work assignments, scheduling, job assessment and evaluation, workplace inspections, implementation of dress codes and disciplinary action. Differences of opinion or minor disagreements between co-workers would also not generally be considered workplace harassment.

Workers are encouraged to report any incidents of workplace harassment. Retaliation or reprisals are prohibited against any worker who has legitimately filed a complaint under this Policy, or has provided information regarding a complaint. Any retaliation or reprisal by any party to this Policy is subject to immediate corrective action, up to and including termination.

Management Group will investigate and deal with all concerns, complaints, or incidents of Workplace Harassment and/or Sexual Harassment in a fair and timely manner while respecting the worker's privacy. Options Incorporated obligation to conduct an investigation into the complaint may however require some disclosure.

Nothing in this policy prevents or discourages a worker from filing an application with the Human Rights Tribunal of Ontario on a matter related to Ontario's Human Rights Code within one year of the last alleged incident. A worker also retains the right to exercise any other legal avenues that may be available.

## 14.2. Workplace Violence Policy

OI is committed to prevention of workplace violence and is ultimately responsible for worker health and safety while in the workplace. OI will take whatever steps are reasonable to protect workers from workplace violence from all potential sources.

**Workplace Violence** means:

- a. the exercise of physical force by a person against a worker, in a workplace, that causes or could cause physical injury to the worker;
- b. an attempt to exercise physical force against a worker, in a workplace that could cause physical injury to the worker; and/or
- c. a statement or behaviour that it is reasonable for a worker to interpret as a threat to exercise physical force against the worker, in a workplace, that could cause physical injury to the worker.

**Domestic violence** - means a pattern of coercive tactics, which can include physical, psychological, sexual, economic and emotional abuse perpetrated by one person against an adult intimate partner, with the goal of establishing and maintaining power and control over the victim.

**Workplace** - means any place where business or work-related activities are conducted. It includes, but is not limited to, the physical work premises, work-related social functions (ie. parties, golf games, etc.), work assignments outside the company's offices, work-related travel and work-related conferences or training sessions.

OI does not tolerate violence in the workplace perpetrated by or against workers, supervisors, clients, or other third parties. Everyone is expected to uphold this policy and work together to prevent workplace violence.

There is a workplace violence program in effect. It includes procedures to protect workers from workplace violence, the means to summon assistance, and the process for workers to report incidents or raise concerns. OI will ensure that this policy and the associated program are implemented and maintained and that all workers, supervisors, and employers have the appropriate information and instruction to protect them from violence in the workplace.

Workers must adhere to this policy and the supporting program. They are encouraged to raise any concerns about workplace violence and to report any violent incidents, threats, potential risk of violence, or unacceptable behaviour they may experience or witness. This includes non-work life issues that may impact the worker's and/or their co-workers' safety. Retaliation or reprisals are prohibited against any worker who has legitimately complained under this Policy, or has provided information regarding a complaint. Any retaliation or reprisal by any party subject to this policy is subject to immediate corrective action, up to and including termination.

Supervisors will adhere to this policy and the associated program. They will ensure measures and procedures are followed by workers so they have the information needed to protect themselves.

Employers will adhere to this policy and the supporting program. They will also ensure measures and procedures are followed by workers so they have the information needed to protect themselves.

OI pledges to investigate and deal with all incidents and complaints of workplace violence in a timely and fair manner, respecting the privacy of all concerned to the extent possible. OI obligation to conduct an investigation into the complaint may however require some disclosure.

### **14.3. Workplace Harassment and Violence Program**

OI established the Workplace Harassment and Violence Program to reduce the risk of violence, harassment, sexual harassment, and unacceptable behaviour in the workplace, to nurture the safety and security of all workers, supervisors, clients, or other third parties.

The Workplace Violence Policy, Workplace Harassment Policy (herein after referred to as “the Policies”) and Workplace Harassment and Violence Program will be reviewed annually at minimum, regardless of the size of the workplace or the number of workers. The review will be completed in conjunction with relevant investigative recommendations, and the Health and Safety Representative to ensure its effectiveness.

The Policies and associated Workplace Harassment and Violence Program apply to all workers of Options Incorporated (full-time, part-time, contract and temporary), supervisors, clients, or other third parties.

The Policies and associated Workplace Harassment and Violence Program apply not only during working time, but also to any place where business or work-related activities are conducted. It includes, but is not limited to, the physical work premises, work-related social functions (ie. parties, golf games, etc.), work assignments outside the Company’s offices, work-related travel and work-related conferences or training sessions.

The Workplace Harassment and Violence Program includes the following components:

- definitions;
- responsibilities:
  - workers;
  - supervisors; &
  - employers.
- procedures:
  - risk assessments;
  - summoning immediate assistance;
  - incident reporting and investigation; &
  - training and education.
- domestic violence;
- workplace violence and harassment while travelling; &
- safety plan.

#### 14.3.1. Definitions

**Unacceptable Behaviour** - means physically or psychologically aggressive behaviours including but not limited to:

- hitting, kicking, punching, pushing, shoving, slapping, pinching, grabbing, biting;
- carrying or brandishing weapons of any sort;



- throwing objects at an individual with a view to cause physical injury or fear;
- destruction of workplace or co-workers' property;
- threats of violence;
- unwanted sexual solicitations or comments targeting sex, sexual orientation, gender identity, gender expression;
- intimidating behaviour that causes the recipient to have a fear of physical violence;
- obscene or harassing communications ie. texts, e-mails, phone calls; &
- it is not meant to include accidental situations such as a worker tripping over an object and pushing a coworker as a result.

**Close Calls** - means incidents, which did not result in actual physical harm but, except for circumstance, had the potential to result in physical harm.

**Minor Incident** - means an incident in which no one is physically harmed in any way and which was resolved through consultant or supervisory mediation.

**Serious Incident** - means an incident in which someone was physically harmed (whether requiring medical attention or not), or which continued or escalated after supervisory mediation.

### 14.3.2. Responsibilities

#### *Employers*

Responsibilities include the following:

- assess the risk of violence, minimize the risk and take every precaution reasonable in the circumstances to protect workers;
- provide information, instruction and supervision to a worker to protect their health and safety;
- keep incidents in strict confidentiality in order to properly investigate the incident and offer adequate support to those involved;
- co-operate with police, company investigators or other authorities, as required during any investigation related to workplace violence; &
- ensure the complainant is neither penalized nor treated unfairly as a result of reporting the incident. Reprisals will not be tolerated and disciplinary action will be taken against those who engage in such activity.

## *Supervisors*

Responsibilities include the following:

- assess the risk of violence, harassment, or sexual harassment to workers under their supervision, minimizing those risks where necessary or reasonably possible, and informing any affected worker of such risk or potential risk;
- ensure workers are trained to:
  - recognize the potential for violence, harassment, sexual harassment including domestic violence;
  - follow and enforce the procedures developed to minimize risk;
  - respond to incidents appropriately; &
  - report and document such incidents.
- track and report risks of violence, incidents of violence, harassment, or sexual harassment and close calls to the administrative manager within the timelines set out in the procedures;
- ensure proper medical care is provided for anyone involved in an incident and for securing the safety of workers, before investigating the incident or taking reports;
- co-operate with police, company investigators or other authorities, as required during any investigation related to workplace violence;
- advise a worker of the existence of any actual or potential danger to the health or safety of the worker of which the supervisor is aware of;
- keep incidents in strict confidentiality in order to properly investigate the incident and offer adequate support to those involved; &
- ensure the complainant is neither penalized nor treated unfairly as a result of reporting the incident. Reprisals will not be tolerated and disciplinary action will be taken against those who engage in such activity.

## *Workers*

Responsibilities include the following:

- inform their supervisor/employer of any violence, potential risk of violence, harassment, sexual harassment, or unacceptable behaviour they may experience or witness. This includes non-work life issues that may impact the worker's and/or their co-workers' safety;
- report to their supervisor/employer any incidents of violence or close calls, according to the procedures set out in this program;
- record the details of any incident, the nature of the violent act and names of person(s) who may have witnessed the incident;

- attend any training or information sessions provided by the employer to reduce violence or risks of violence, harassment, and/or sexual harassment;
- report the absence of, or defect in, any equipment or protective device of which the worker is aware;
- co-operate with the police, company investigators or other authorities as required during any investigation related to workplace violence, harassment, and/or sexual harassment;
- keep incidents strictly confidential in order to allow employers to properly investigate the incident and to offer adequate support to those involved. Workers aware of incidents of workplace violence must not disclose details of the incident without prior consent from either the manager or investigator;
- ensure the complainant is neither penalized nor treated unfairly as a result of reporting the incident. Reprisals will not be tolerated and progressive disciplinary action will be taken against those who engage in such activity.

### **14.3.3. Workplace Harassment and Violence Procedures**

#### *Risk Assessments*

OI shall initiate a process involving workers, supervisors, employer, and the health and safety representative in assessing the risk of violence, harassment, and sexual harassment that may arise from the nature of the workplace, type of work, work conditions and/or circumstances of the workplaces.

In conjunction with the health and safety representative, specific procedures may be developed to control identified risks. Scope may range from work arrangements, the work environment, to training and education. All actions to prevent workplace violence, harassment, and sexual harassment will be documented in procedures or specifically cross referenced in other policies.

Risk assessment shall be repeated as often as necessary but annually at minimum to ensure the effectiveness of the Policies and related Workplace Violence and Harassment Program.

## *Summoning Immediate Assistance*

This procedure works in conjunction with the Safety Communication Procedures outlined in section 13.8 and the Emergency Signal and Code Word Procedures outlined in section 15.1.

In uncomfortable but non-violent scenarios, emergency signal 111 group text and/or “OI ERGO REVIEW” code words may be used to discreetly alert co-workers without raising client suspicions or alarming others to facilitate the “Senders” withdrawal from the unpleasant interaction.

In the event of serious medical assistance, imminent threat of physical violence, attempted physical violence, and/or violence, do whatever is necessary to get attention and summon help. In dire situations, pull the fire alarm, activate panic buttons, use vehicle horns, and/or call 911. When time permits and it’s safe to do so, report to OI management.

OI iPhones are central to summon immediate assistance and therefore must be carried, monitored, battery charged, and “on” at minimum during business hours. Employees must routinely check their mobile phones to confirm battery power, wireless and/or WiFi signals are available and confirm signal strength

To create redundancy and eliminate any false sense of security created by an over-reliance on mobile phones, situational awareness (SA) is equally critical to summon immediate assistance. Utilize the Wireless Dead Zone Communication Procedures when providing support in a known wireless signal dead zone. If no or weak wireless signal, ensure managers and/or co-workers are aware of location and timings. Utilize the SA Interior strategies to identify alternative phones (land lines), exits, safe areas, and/or emergency buttons/panic alarms. Specifically ask the client how to summon emergency services.

## *Reporting and Investigation*

Upon witnessing or experiencing an alleged incident or alleged threat of violence, harassment, sexual harassment, and/or domestic violence in the workplace, when safe to do so it shall be reported as soon as practical to the **Administrative Manager who is the Options Incorporated Designated Investigator (OIDI)**. Initial reports may be verbal, text, or e-mail however verbal or text reports shall be followed-up by an e-mail or hardcopy memo. Utilizing the “5Ws”, the initial report shall be a clear/concise, unemotional, chronological statement of facts with individuals involved identified by their initials only, and contact information forwarded separately if available. Any conclusions must be referenced back to the legal definitions of workplace violence, harassment, sexual harassment, and/or domestic violence. The **Administrative Manager** must ensure the safety of the complainant and themselves up to and potentially including medical treatment, police, Ministry of Labour in serious instances as appropriate.

Upon receipt of a report of alleged workplace violence, harassment, and/or sexual harassment, the OIDI shall consider the existence of real, potential or perceived conflict of interest, or one that might arise. If satisfied no conflict of interest exists, the OIDI shall next determine if the allegation is covered by the workplace violence and harassment policy.

If the OIDI concludes the allegation is not covered by these policies, the complainant and Management Group will formally receive notification that no investigation will occur.

If the OIDI determines the report necessitates a formal investigation, they will ensure full disclosure to all affected parties (including witnesses) by requesting detailed written statements with supporting evidence/information (if available) prepared, dated, and signed by all the affected parties within five (5) business days of receiving the initial report. The investigator shall inform all affected parties the matter is strictly confidential and must not discuss/disclose details without prior consent.

The OIDI will receive all detailed statements within five (5) business days of their request for review and consideration. All affected parties may be interviewed by the OIDI and must answer follow-up questions and/or clarifications at any time during the review and investigation report preparation.

Interim measures may be imposed during the investigation to ensure that the work environment remains respectful and service to the client is not compromised. These measures will be determined and implemented by the Management Group in consultation with the OIDI and other relevant parties.

The final investigative report shall be submitted to the OI President in memorandum format with signed statements, memoranda, or other supporting documentation and forms of evidence attached. The final report will contain the following:

- a thorough but concise summary of the facts in chronological order, referenced and substantiated by the statements and supporting evidence/information submitted by all affected parties;
- a determination as to whether or not the allegations have been proven on the balance of probabilities;
- a determination as to whether or not the workplace violence and/or harassment policies have been violated;
- a determination as to whether the complaint was vexatious and made in bad faith, in which instance the investigator concludes no breach of the workplace violence and harassment policies;
- recommend corrective actions;
- recommend policy/program amendments; &
- any mitigating or aggravating circumstances affecting the parties.

The President of OI will review the report, approve or dismiss determinations and recommendations with reasons, and provide direction as appropriate. The President will distribute a copy of the final investigative report to all affected parties with their comments added via cover page.

The original copy of the investigation including the original report, notes, statements, and supporting documentation, will be placed on file.

Should the OIDI receive evidence that they reasonably believe relates to an allegation of a criminal act, they shall suspend the investigation and refer the matter immediately to the President of OI.

Consequences of workplace violence and harassment could include progressive disciplinary action, up to and including termination of employment.

If more than one report of workplace violence or harassment has been lodged against an individual, the reports may be investigated together.

### *Training and Education*

All workers, supervisors, and employers are required to be educated on the contents of the Policies and associated program. The training shall include:

- individual risk reduction and prevention strategies/actions;
- how to summon immediate assistance;
- how to recognize workplace violence, harassment, and/or sexual harassment, including domestic violence;
- how and whom to report an incident or complaint of workplace violence, harassment, and/or sexual harassment;
- how Options Incorporated will investigate and deal with an incident or complaint of workplace violence, harassment, and/or sexual harassment; &
- how Options Incorporated will report the results of the investigation to the complainant and the accused – if the accused is employed by Options Incorporated.

Newly hired workers are provided a copy of the Policies and associated program for detailed review and consideration as a component of new employee onboarding.

All workers, supervisors, and employers annually review the contents of the Workplace Harassment & Violence eLearning module on the “Health & Safety” page of the Lunch Room. The module establishes a basic foundation for reduction and prevention including how to summons assistance, report incidents, and specific actions/strategies to reduce identified risks. It facilitates identification of harassment and violence including domestic violence in the workplace. Lastly, the module serves as a quick reference guide.

This Policy and associated program components shall be posted to the “Health & Safety” page of the Lunch Room.

#### **14.3.4. Domestic Violence**

OI will assist in protecting workers and co-workers from domestic violence in the workplace by taking reasonable precautions, co-operating with external organizations, and/or developing specific safety plans. It is the responsibility of a worker to report concerns to the **Administrative Manager** if they fear domestic violence may enter the workplace. Each incident of domestic violence will be evaluated on a case-by-case basis.

#### **14.3.5. Workplace Violence and Harassment While Travelling**

OI has developed international travel risk assessments and checklists. A travel risk assessment must be complete prior to departure for an initial visit to an out-of-country location to identify extreme/high risk categories (including harassment and violence) and develop mitigation strategies and/or adjust travel/employment plans accordingly. The international travel risk assessments are living documents that may be amended at any time before, during, after a trip to capture the traveller’s experiences. Both the risk assessments and checklists may be accessed on the “Health & Safety” page of the Lunch Room.

#### **14.3.6. Safety Plan**

A safety plan identifies the actions to increase worker and co-worker safety while preparing for the possibility of further workplace/domestic violence. Furthermore, a safety plan carefully co-ordinates the available resources and support to both victims and witnesses of workplace/domestic violence with local organizations and provincial agencies to create individually tailored plans - essentially OI acts as a facilitator. Safety plans are a crucial step in ensuring worker safety.

# 15. Emergency Signal and Code Word

This policy works in conjunction with the Safety Communication Procedures outlined in section 13.8 and the Summoning Immediate Assistance Procedures outlined in section 14.3.3 of the Workplace Harassment and Violence policy.

Emergency signals and/or code words can simplify communication, discreetly alert co-workers, and/or summon help without raising client suspicions or alarming others.

Options Incorporated (OI) has a simple two-tiered emergency signal and code word procedure based on the intensity of the threat. Tier 1 is for uncomfortable but non-threatening behaviours. Tier 2 is for imminent threat of physical violence, attempted physical violence, violence, serious medical assistance, and/or property damage.

In dire situations, pull the fire alarm, activate panic buttons, use vehicle horns, and/or call 911. When time permits and it's safe to do so, report to the **Administrative Manager** remembering to utilize the "5Ws".

## 15.1. Emergency Signal and Code Word Procedures

Level	Individual Environment Numeric Code	Group Environment Phrase	Application	Sender Actions	Recipient Actions
Tier 1	111	<b>OI ERGO REVIEW</b>	Discreetly alert a single or multiple OI consultants and/or managers to uncomfortable but non-threatening behaviours.	<p>When interacting with a client and the "Sender" wants to discreetly alert OI co-workers to a situation without alarming others, they incorporate the following phrase into a sentence ie. "I'll need to step-out for an <b><u>OI ERGO REVIEW</u></b>".</p> <p>The "Sender" group texts <b>111</b> to the "OI Team" with the expectation of a return phone call that allows them to covertly step away and remove themselves from the</p>	<p>Upon hearing and recognizing the <b><u>OI ERGO REVIEW</u></b> phrase, OI co-workers will facilitate the "Sender's" withdrawal from the interaction.</p> <p>Upon receiving a <b>111</b> text, the "Recipients" will call the "Sender" to provide them an opportunity to discreetly remove them from the interaction.</p>



Level	Individual Environment Numeric Code	Group Environment Phrase	Application	Sender Actions	Recipient Actions
				<p>interaction ie. <i>"I'm sorry, but this is my head office calling, I need to take this call"</i>.</p> <p>The "Sender" will follow-up with those "Recipients" that the situation is resolved when it is appropriate to do so.</p>	
Tier 2	911		<p>Serious medical assistance, imminent threat of physical violence, attempted physical violence, and/or violence, threats of property damage, suspected criminal activity, and/or property damage requiring immediate police, fire, and/or ambulance.</p>	<p>The "Sender" contacts <b>911</b> immediately. Report to OI management as soon as practical, remembering to utilize the "5Ws".</p> <p>In dire situations, the "Sender" must do whatever they feel is necessary to get attention ie. pull fire alarms</p>	

## 16. Home Office Policy

The home office is a convenient work option that potentially benefits both the employee and Options Incorporated (OI). These benefits are both tangible and intangible and may range from increased productivity to higher job satisfaction and flexible hours. On a fundamental level, the home office is consistent with the OI social and environmental sustainability commitment.

A home office presents a unique employment situation with little regulatory clarity. Although OI has a general duty to ensure the health and safety of all employees, a home office is not a workplace under its control. As a result, OI must demonstrate due diligence by ensuring employees utilizing home offices understand and agree to comply (as reasonably possible) with all corporate policies within the parameters of this handbook.

The employee is responsible for the costs of maintaining and supplying the equipment for the home office and therefore **may** be eligible to deduct employment related expenses from their income if specific Canada Revenue Agency criteria are met - due to the complexity of the Income Tax Act, they should seek the professional advice on this matter.

The home office option is conditional on a series of factors that may include time pressures, collaboration/communication demands, travel distance, etc. Home office utilization is considered and approved on an individual project/sub task basis. Upon approval, hours of work, scope, milestones, and deliverables must be identified, closely monitored, and over communicated. OI reserves the right to revoke work from home privileges at any time.

Any accident or injury occurring in the home office while completing OI tasks must be reported in accordance with the Employee Responsibilities outlined in section **13.10.3**.

From a health and safety viewpoint, the following points must be considered:

- ergonomics of workstation design and arrangement;
- work scheduling and distribution; &
- working alone.

## **16.1. Ergonomic Considerations**

A home office should attempt to achieve the same health and safety standards as those available in a traditional workplace. As a professional ergonomic consulting company, the home office workstations of OI employees should be setup and adjusted properly including the environment of the selected work area - consideration of lighting, climate/temperature, noise, and area distractions.

## **16.2. Work Scheduling (Work Load) Impacts**

Extended hours in the same body position or repeated motions can lead to various musculoskeletal injuries. Work scheduling, pacing and overall workload distribution also requires attention and can often be overlooked in the home office environment when there is no official end to the workday or natural breaks ie. discussions with co-workers or a quick walk to the printer that create opportunities for a change in body position.

Duties, expectations, and deadlines will be clearly outlined and agreed upon by both the employee and manager.

## 16.3. Safety and Security Considerations

A home office should attempt to achieve the same level of safety and physical security available in a traditional workplace. When an employee is working at home, they are most often working alone. While working alone in itself is not a risk, it can present a unique situation should something unexpected happen. Therefore, it is critically important to maintain communications throughout working hours.

### 16.3.1. Information Security Considerations

The importance of protecting confidential client and personal information from inadvertent disclosure remains unchanged while working from home.

Personal home WiFi is requested to use network security protocols WPA or WPA-2, a strong password to join, and browser/IOS password autofill settings deactivated.

### 16.3.2. Communication Procedures

These procedures work in conjunction with the Safety Communication Procedures outlined in section 13.8 and the Emergency Signal and Code Word Procedures outlined in section 15.1.

While working from home, employees and affected supervisors and managers must over communicate to facilitate situational awareness and provide adequate project/task support and monitoring within the identified scope. Employees must be available by phone, e-mail, text during working hours.

Under no circumstances will an employee conduct in-person business meetings at a home office. If technology cannot be utilized or inappropriate to facilitate a virtual meeting, an in-person meeting may only be arranged in a public location ie. coffee shop or at the client's location if required with the concurrence of the affected manager.

To counter information technologies such as Caller ID, Google Maps Street View, and 411 Reverse Lookup, employees will provide the mailing address and toll-free phone number of the Head Office as required. Further, employees must avoid the use of personal "home" phones to conduct business related activities.

Although there is no data indicating an employee working from a home office is at an increased risk of experiencing harassment and/or violence, it is reasonable to assume family, friends, and neighbours unfamiliar with home offices or workplace policies may unintentionally increase that risk. Communicate work hours, identify boundaries, establish procedures, and define acceptable interruptions to anyone a consultant may interact with in their home to help mitigate this potential risk.

## **16.4. Home Office Safety Checklist**

In addition to the already mentioned considerations, the following should be investigated:

### **16.4.1. Fire Protection**

Employees should be familiar and in compliance with their municipal residential bylaws/fire codes, which may supersede the following minimum considerations:

- is there a smoke alarm;
- is there clear access to a fire extinguisher; &
- is there a carbon monoxide detector in areas where there are fuel burning appliances.

### **16.4.2. Emergency Procedures**

- has an evacuation plan been established;
- are the first aid supplies adequate;
- are emergency contact numbers posted near the telephone;
- has a periodic contact schedule been established; &
- does your office contact know how to reach someone near you in the event of an emergency?

### **16.4.3. Electrical Safety**

- are extension cords in good condition and positioned properly;
- are cords and cables causing a tripping hazard;
- are outlets grounded and not overloaded;
- is there surge protection for the electrical equipment; &
- is there sufficient ventilation for electrical equipment?

## 17. Disconnecting from Work

With fewer than 25 employees, Options Incorporated (OI) is exempt from these provisions of the Employment Standards Act (ESA). OI generally adheres to the intent of these guidelines with the following exceptions:

- communicate (both outgoing and incoming) with employees outside of typical work hours and/or time-off when individual and/or collective health and safety is a concern;
- communicate (both outgoing and incoming) with employees outside of typical work hours and/or time-off to adjust schedules and/or client support; &
- it is understood there will always be unique circumstances and situations that will necessitate work-related communications with employees outside of typical work hours and/or time-off. These irregular hours are included in an employee's salary but shall not exceed ESA guidelines.

## 18. Accessibility for Ontarians with Disabilities

Defined as a small private sector organization with fewer than 49 employees, Options Incorporated (OI) is exempt from the requirement to file accessibility reports under Section 14 of the Accessibility for Ontarians with Disabilities Act (AODA). OI is required to adhere to Accessibility Standard for Customer Service Regulation and Integrated Accessibility Standard Regulation of the AODA for businesses and non-profits with 1-19 employees.

### 18.1. Accessibility Policy

In accordance with the Integrated Accessibility Standards Regulation for businesses and non-profits with 1-19 employees, OI is committed to improving accessibility and will implement the following practices as necessary. Conduct employee training on Ontario's accessibility laws and the Human Rights Code that applies to persons with disabilities. When requested, provide information and communication materials in accessible formats or with communication supports as determined by the needs of the persons with disabilities. Accommodate the needs of potential employees with disabilities during the hiring process. Lastly, OI will identify and carefully review any policies that do not respect and promote the dignity and independence of persons with disabilities.

## 18.2. Customer Service Standard

In accordance with Accessibility Standard for Customer Service Regulation, OI is committed to providing services to individuals with disabilities. Employees will encounter persons with disabilities and therefore must quickly identify and conduct themselves in a manner consistent with the principles of independence, dignity, integration, and equal opportunity. An online eLearning module utilizing these principles is a component of new employee onboarding.

## 19. Progressive Discipline Policy

Options Incorporated (OI) reserves the right to use a progressive discipline procedure when appropriate to address unacceptable conduct and/or performance in a fair and consistent manner. This may include a verbal warning, a written warning letter, a suspension without pay for a defined period, and termination for cause. Depending on the severity and context of the circumstances, OI will, at its discretion, decide where on the continuum to initiate progressive discipline. Failure to correct past misconduct and/or performance issues justifies increasingly more severe penalties.

Managers are responsible for prompt identification and response to any unsatisfactory conduct and/or performance and they will initiate progressive discipline only after consultation with the President of OI.

The fundamental principle of a progressive discipline procedure is to salvage the professional relationship by correcting the unacceptable conduct and/or performance. With the exception of a verbal warning, all other correspondence is written, presented in hardcopy in person, and will clearly communicate the expected conduct and/or performance standard. Further, all hardcopy correspondence will clearly outline an action plan to achieve the desired change that may include counseling and/or training if the circumstances warrant and the consequence for failing to improve within the specified timeframe.

### 19.1. Attendance Management Procedure

Regular attendance and punctuality are conditions of employment with OI. Regular attendance is a performance commitment that is expected of all employees and is essential for the effective performance and operation of the company.

Employees must arrange personal appointments outside of scheduled working hours wherever reasonably possible. When this cannot be achieved, employees must carefully coordinate and receive approval via the **Administrative Manager** - to minimize potential disruption and avoid compromised service to the client.

Employees who are absent or late for any reason must contact the **Administrative Manager** as soon as safely possible prior to their scheduled workday and/or

appointment. Contact will be attempted via all available means (text, e-mail, phone) until an acknowledgment is received or voice communications established. A message must identify the employee, include the reason for absence/late, personal safety/health status, location, estimated arrival time, and callback confirmation.

If an employee is absent three (3) consecutive workdays or more without notifying the **Administrative Manager**, they will be presumed to have resigned from their position, and their employment will be terminated without notice.

The **Administrative Manager** must approve unpaid time-off requests.

Employees will NOT drive on closed roads or otherwise take risks to get to work and/or the client. However, some effort to report to work and/or the client should be made if conditions clear. If an employee is unable to arrive or will be late arriving to work and/or the client because of inclement weather conditions, they must contact the **Administrative Manager** as soon as safely possible, to advise of their absence or delay.

Depending on the severity and context of the circumstances resulting in the failure to appropriately report an absence or delay (no-call/no-show), OI will, at its discretion, decide where on the continuum to initiate progressive discipline.

## **19.2. Performance Management Procedure**

Performance reviews are continuous and managers will frequently provide employees ongoing and timely feedback. Continual feedback (both positive and constructive) ensures employees know how they're performing right away near the time of occurrence, so they can quickly course-correct. To maximize efficiencies, feedback mediums include electronic exchanges (report edits, e-mail, text), phone call, in-camera Zoom discussion, coffee/lunch conversation, and/or Feedback Friday style dialogue.

All performance is assessed in accordance with the essential duties inherent in the position summarized in the appropriate physical demands description and cognitive demands analysis.

Performance feedback generates management coaching opportunities that promote both employee engagement and transformation relationships. This is achieved through open, honest, and two-way communication of the expected standard and identification of employee professional development needs from a growth mindset.

If performance feedback identifies unacceptable performance, progressive discipline will be utilized to correct recurring performance concerns in an effort to salvage the professional relationship with a plan moving forward that clearly identifies the area of focus, the expected performance standard, a plan to achieve the expected standard including timeline, follow-up, and consequences for failing to improve.

All performance feedback conversations are private and confidential.

### **19.3. Smoking**

Smoking is not permitted inside the workplace and the use of all tobacco products including chewing tobacco, cigarettes, and/or e-cigarettes is banned. The workplace means any place where business or work-related activities are conducted and includes, but is not limited to, the physical work premises, work-related social functions (ie. parties, golf games, etc.), work assignments outside the OI office, work-related travel and work-related conferences or training sessions.

In accordance with the Smoke Free Ontario Act, smoking is permitted outside only in an area designated as a “smoking area”. Designated receptacles must be used to dispose of cigarettes, vape juice bottles, matches and related paraphernalia - littering is strictly forbidden. Smoking will only occur before and after working hours, during lunch periods, and designated break periods. Smokers are not permitted additional “smoke breaks”.

In the event a non-smoker has a complaint about tobacco smoke in or around the workplace, the concern of the non-smoker shall prevail.

An employee who smokes and/or uses tobacco products in the workplace is in contravention of this policy and is subject to progressive discipline. Employees are defined as anyone who is employed for a period that exceeds three (3) months and may include full-time, regular part-time, contract employees, and managers.

### **19.4. Drug and Alcohol Use**

No employee shall use, possess, sell, purchase, distribute, transfer illegal drugs, non-prescription inhalants or be under the influence of legal drugs and/or alcohol while in the normal course of their employment. This prohibition includes lunch hours and/or break periods. Employees are defined as anyone who is employed for a period that exceeds three (3) months and may include full-time, regular part-time, contract employees, and managers.

The workplace means any place where business or work-related activities are conducted and includes, but is not limited to, the physical work premises, work-related social functions (ie. parties, golf games, etc.), work assignments outside the Company’s offices, work-related travel and work-related conferences or training sessions. No employees shall consume alcohol in the workplace unless the circumstances are appropriate and pre-approval by the appropriate OI manager has been granted.

An employee who consumes alcohol beverages is expected to do so in a responsible manner. Employees are expected to know their own tolerance of alcohol. Nonetheless, no employee shall drive after the consumption of more than one (1) standard drink in one (1) hour, or two (2) standard drinks during any social function of two (2) hours in length or longer.

No employee shall attend the workplace impaired. Impairment refers to a deterioration of an individual's judgment and decrease in his or her cognitive and physical abilities. Physical signs of impairment may include the odour of alcohol, slurred speech, flushed



face, blood-shot/watery eyes, and/or loss of motor control/co-ordination. Cognitive indicators may include aggressive or loud behaviour, diminished sensory perceptions, judgment, and/or comprehension not typical to the individual.

An employee who is discovered to be under the influence of illegal/legal drugs use and/or consuming alcohol while in the normal course of their employment, during a lunch period and/or break period, or who reports for work impaired, will be subject to progressive discipline.

Any employee with a question about substance abuse is encouraged to contact the **Administrative Manager**. OI will arrange for assistance and/or referral to an appropriate community resource.

## **20. Vacation**

### **20.1. Vacation Entitlement**

Options Incorporated (OI) employees are entitled to two (2) weeks vacation per year. The vacation entitlement year is January first (1<sup>st</sup>) to December 31<sup>st</sup>. Vacation entitlements are granted annually on January first (1<sup>st</sup>) in accordance with individual employment agreements.

Vacation entitlement increases are based upon the number of years of continuous employment in accordance with the Employment Standards Act 2000 or individual employment agreements.

Employees with less than one (1) year of employment with Options Incorporated as at December 31<sup>st</sup> will have their vacation entitlement for the year prorated based on full months of employment within that calendar year.

Employees departing for or returning from statutory leave of absence (pregnancy & parental, personal emergency, family caregiver, family medical, critical illness, organ donor, child death, crime-related disappearance, reservist leave) or other approved leave of absence will be eligible to a minimum of two (2) weeks vacation each calendar year.

If a public holiday falls during a vacation period, the public holiday does not count as a vacation day.

Vacation cannot be carried forward nor paid-out if unused within the vacation entitlement year. Employees are responsible to ensure they have used all their entitled vacation time by the end of the vacation entitlement each year. The annual vacation entitlement resets January 1<sup>st</sup> each year.

### 20.1.1. Prorated Vacation Entitlement Calculation

For new and existing employees, the prorated vacation time entitlement is calculated as two (2) weeks multiplied by the ratio of the length of the full months of employment within the 12 month vacation entitlement year:

$$2 \text{ weeks} \times \text{full months of employment}/12 = \text{a number of week(s)}$$

$$\text{ie. } 2 \text{ weeks} \times 5 \text{ months}/12 = 0.83 \text{ weeks (4.16 days)}$$

## 20.2. Vacation Pay

### 20.2.1. Salaried Employees

Vacation pay for salaried employees is calculated as a percentage of applicable earnings during the vacation entitlement year. A two (2) week vacation entitlement equals four percent (4%) and a three (3) week vacation entitlement equals six percent (6%) of applicable earnings.

Salaried employees will accrue vacation pay on applicable earnings each pay period. Vacation pay for vacation taken will be deducted and paid in either half day (four (4) hour) or full day (eight (8) hour) increments from the accrued total. A negative accrued vacation pay balance may occur until applicable earnings accumulate, essentially creating a vacation pay deficit. Any vacation pay deficit will be recaptured on the final pay period of the vacation entitlement year.

If a salaried employee is on statutory leave of absence (pregnancy & parental, personal emergency, family caregiver, family medical, critical illness, organ donor, child death, crime-related disappearance, reservist leave) or other approved leave of absence during the vacation entitlement year and does not earn a salary, vacation pay (**not vacation entitlement**) is prorated accordingly.

Vacation pay cannot be carried forward if unused within the vacation entitlement year.

### 20.2.2. Hourly Employees

Hourly employee vacation pay is paid out each pay period with consultant approval via the Employee Vacation Pay Agreement form. A two (2) week vacation entitlement equals four percent (4%) and a three (3) week vacation entitlement equals six percent (6%) of applicable earnings.

## 20.3. Vacation Scheduling

Under the Employment Standards Act 2000, the employer approves vacation based on the needs/workload of operations in consultation with the employee.

Vacation is to be taken in one (1) or two (2) week blocks whenever possible to facilitate sufficient coverage. Individual vacation half day (four (4) hour) or full day (eight (8) hour) increments may be requested, but will be approved based on the operational needs of Options Incorporated (OI).

Vacation requests must be made to the **Administrative Manager** as far in advance of the desired dates as reasonably possible, to facilitate planning and obtain approval. OI will attempt to accommodate all vacation requests while balancing the needs of both employer and employee.

## 21. Paid Time Off

Options Incorporated (OI) employees may be entitled to Paid Time Off (PTO). The PTO entitlement year is January first (1<sup>st</sup>) to December 31<sup>st</sup>. PTO entitlements are granted annually on January first (1<sup>st</sup>) in accordance with individual employment agreements.

PTO days may be utilized for sick days, childcare issues, medical appointments, and/or personal situations in half day (four (4) hour) or full day (eight (8) hour) increments. PTO entitlement cannot be carried forward nor paid-out if unused within the PTO entitlement year **or paid upon termination of employment.**

### 21.1.1. Scheduled Time Off

PTO requests must be made to the **Administrative Manager** as far in advance of the desired date as reasonably possible, to facilitate planning and obtain approval. OI will attempt to accommodate all PTO requests while balancing the needs of both employer and employee.

### 21.1.2. Unscheduled Time Off

Employees must contact the **Administrative Manager** immediately, or as reasonably possible prior to his or her scheduled workday and/or appointment in accordance with Attendance Management procedures outlined in section **19.1.**

## 22. Unpaid Time Off

### 22.1.1. Protected Leave

In Ontario, the Employment Standards Act 2000 provides for several categories of protected statutory leaves of absence. Each category has different requirements, including the minimum period of employment to be eligible for leave, the maximum length of the leave, the minimum notice that must be provided to Options Incorporated (OI), and the required supporting documentation to determine entitlement to leave.

For enrolled employees, the employer-paid Health and Dental coverage of the Group Benefit Plan will continue during approved unpaid leave of absences. However, Life Insurance (Life), Dependent Life Insurance (Dep Life), and/or Long-Term Disability (LTD) premiums are an employee-paid benefit. In order for Life, Dep Life, and/or LTD to remain a tax-free benefit, employees are required to continue to pay these premiums for Income Tax purposes during their absence.

This activity must be co-ordinated with the Finance Manager to confirm the monthly premium amount and finalize premium payments via post-dated cheques or lump sum.

### 22.1.2. Unprotected Leave

Unpaid time off external to the statutory leaves of absence outlined in the ESA and supplemental to annual Vacation and/or Paid Time Off (PTO) entitlements are only considered when all annual entitlements are exhausted.

Requests for unpaid time off are individually assessed against OI financial forecasts, identified administrative challenges, client needs, and staffing/project support planning impacts with no guarantee of approval. As a result, all requests for unpaid time off must be made to the Administrative Manager via e-mail with as much advanced notice as possible to facilitate potential mitigation options.

## 23. Christmas Shutdown

Options Incorporated (OI) shuts down operations for the days between Boxing Day and New Year's Day. Generally, the timing of the Statutory holidays will be scheduled such that there will be three (3) shutdown days. These three (3) days will be scheduled as paid days off and OI's gift to create time for family and friends during the Holiday Season. These days cannot be carried forward, nor paid-out if unused or paid upon termination of employment.

## 24. August Civic Holiday

Not a statutory holiday in Ontario, Options Incorporated (OI) categorizes the August Civic Holiday as a floating paid day off. Employees have the option to take the August Civic Holiday as scheduled or utilize this one (1) paid day off at any time during the entitlement year January first (1<sup>st</sup>) to December 31<sup>st</sup>.

Taking the August Civic Holiday as scheduled is the default option unless employees individually communicate their request to the Administrative Manager via e-mail no later than the second Friday in July to facilitate planning and obtain approval.

This entitlement is not available to new hires onboarded after August first (1<sup>st</sup>) each entitlement year.

The August Civic Holiday cannot be carried forward, nor paid-out if unused within the entitlement year or paid upon termination of employment.

## 25. Payroll

All employees will be set-up with an external payroll service for automatic payroll deposit. To facilitate this, the Employee Data Form (F1) must be completed and banking information provided via a void cheque upon hiring. All personal information is collected, used, and disclosed in accordance with the Information Protection and Electronic Documents Act (PIPEDA).

Employees record support of their daily scheduled hours via the “clock-in/out” function of the When I Work (WIW) employee scheduling software. Payday is every second (2<sup>nd</sup>) Friday and pay is one (1) week in arrears.

All employees will receive their softcopy/electronic pay statements and annual T4s via the Dayforce Self Service application on their OI iPhone.

### 25.1. Commuting Time

Commuting Time is considered to be the time it takes an employee to get from his or her residence to the first client location and conversely the time it takes an employee to return to his or her residence from their last client location. Commuting Time is a personal responsibility and therefore not considered for labour hours or eligible for mileage.

Commuting Time will transition to Travel Time if an employee is required to transport other OI employees (carpooling) to a client location. The transition occurs for all impacted employees at the relevant pick-up point of each passenger.

## **25.2. Travel Time**

Travel Time is considered to be the time it takes an employee to get from one client location where work will be, or was performed to the next client location where work will be, or was performed, excluding Commuting Time.

When utilizing air and/or rail transportation, Travel Time commences upon arrival to the departure airport and/or train station until the destination location is reached, unless carpooling occurs as defined by Commuting Time.

Approved Travel Time is always relative to the Head Office in Guelph and calculated in two (2) ways with the shortest time selected. The initial calculation is from the Head Office to the approved client location. The subsequent calculation is from the employee departure location to the approved client location.

Eligible Travel Time is allocated at ½ the hourly rate or ½ the calculated hourly rate for salaried employees and included for purposes of overtime determination.

## **25.3. Payroll Deductions**

Federal and Provincial law requires all employers to withhold the following taxes from your salary according to established tax tables:

- Federal and Provincial Income Tax;
- Canada Pension Plan (CPP); &
- Employment Insurance (E.I.).

Group Benefit Plan participants will have additional payroll deductions:

- Life Insurance (Life);
- Dependent Life (Dep Life); and/or
- Long-Term Disability (LTD).

A pay statement detailing these deductions will be provided with each pay.

## **25.4. Pay Garnishments**

The law requires Options Incorporated (OI) to comply with court-ordered payments and wage garnishments when they are presented. Employees affected by wage

garnishments or court-ordered payments will be notified by the **Administrative Manager** of any charge against his or her wages.

No person acting on behalf of OI may dismiss; threaten to dismiss; discipline or suspend; impose any penalty upon; or intimidate or coerce any employee because of a wage garnishment or court-ordered payment.

# Employee Vacation Pay Agreement

I hereby agree to receive payout of my accrued vacation on each pay cheque in accordance with Section 36 of the Ontario Employment Standards Act, 2000 (ESA).

Please sign and return this form to the Administrative Manager to maintain on file.

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Name (please print)

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Signature

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Date



## 26. Expenses Re-imbursement

Approved expenses may be submitted through use of the Expense Form (F2) with original receipts. Receipts may be scanned and included in softcopy Expense Form (F2) submissions - original receipts must be maintained for potential audit purposes. Expenses will be paid on a monthly basis via manual cheque.

Employees understand they are responsible for repayment of any charges deemed not allowable (per Canada Revenue Agency and Options Incorporated) when Expense Forms (F2) are submitted. Employees further understand that any non-allowable amount must be repaid to Options Incorporated (OI) within 30 days of the Expense Form (F2) filing. In the event an employee fails to repay any non-allowable amount, he or she agrees to authorize OI to withhold the full amount from any payment(s) due to the employee, including payroll.

### 26.1. Mileage

Employees will be reimbursed for mileage when using their personal vehicle for travel to **approved client locations only**. Prior to an on-site visit, mileage reimbursement must be confirmed in writing or via e-mail with the affected manager.

Approved mileage is always relative to the Head Office in Guelph and calculated in two (2) ways with the shortest distance selected. The initial calculation is from the Head Office to the approved client location. The subsequent calculation is from the employee departure location to the approved client location.

## 27. Benefit Eligibility

Options Incorporated (OI) offers an Employee Group Benefit Plan that includes Long-Term Disability (LTD), Accidental Death and Dismemberment (AD&D), Life Insurance, Dependent Life Insurance, Health and Dental coverage.

After three (3) months of continuous permanent non-seasonal employment for at least 24 hours each week and without providing evidence of insurability, employees may apply to join the Group Benefit Plan to obtain Basic Life, Accidental Death and Dismemberment (AD&D), Health and Dental coverage.

After six (6) months and subject to approval of evidence of insurability, employees may apply for Long-Term Disability (LTD) and Maximum Employee Life coverage.

Employees may opt out of the Health and Dental coverage when initially offered and still reserve the option to add the Health and Dental coverage at a later date if personal circumstances change. Unfortunately, employees without a spouse or common-law partner cannot opt out of the Health and Dental coverage when initially offered.

Employees that decline benefits will be categorized as a “late applicant” if they decide to join the Group Benefit Plan at a later date. As a late applicant, employees may be subject to additional fees that may change without notice, in addition to providing medical evidence that may result in their application to join the Group Benefit Plan being refused due to ill health.

Each employee must complete and sign either the Benefits Payroll Authorization Form, or the Acknowledgement of Benefit Decline Form.

A softcopy Employee Group Benefits Booklet is available to all employees upon commencement of their employment and may be referenced via a link found on the “Benefits” page of the Lunch Room.

## **27.1. Leave of Absences and Temporary Layoff**

For enrolled employees, the employer-paid Health and Dental coverage of the Group Benefit Plan will continue during approved leave of absences or temporary layoff. However, Life Insurance (Life), Dependent Life Insurance (Dep Life), and/or Long-Term Disability (LTD) premiums are an employee-paid benefit. In order for Life, Dep Life, and/or LTD to remain a tax-free benefit, employees are required to continue to pay these premiums for Income Tax purposes during their absence.

This activity must be co-ordinated with the Finance Manager to confirm the monthly premium amount and finalize premium payments via post-dated cheques or lump sum.

## **27.2. Long-Term Disability**

Employees are entitled to all employee benefits as long as they maintain the minimum number of hours required to remain on the Group Benefit Plan. If an employee becomes disabled due to accident or sickness and is approved for Long-Term Disability (LTD) benefits through our provider, their premiums for Life Insurance (Life) and LTD will be waived by our provider and continue to remain in-force as long as the employee continues to qualify for LTD benefits per our provider’s contract stipulations.

Health and Dental coverage of the Group Benefit Plan will continue for 12 months after the employee’s last day of work, at which point they will be terminated.

If an employee wishes to purchase their own Health and Dental coverage, they may contact our benefit advisors at The Winch Group within 60-days of the termination of their benefits to apply for personal Health and Dental coverage. The employee will also have 31 days after termination of their benefits to convert their group life insurance benefits to a personal plan.

# Benefits Payroll Authorization Form

I hereby authorize the Administrative Manager and Plan Administrator to withhold the Life Insurance (Life), Dependent Life (Dep Life), and/or Long-Term Disability (LTD) premium charges each pay period (as applicable).

I understand that this amount may change from time to time in accordance with Employee Group Benefits Plan premium updates and that the amount charged to me will never exceed the Life and/or LTD portion of the premium charges I am required to pay under this plan.

Please sign and return this form to the Administrative Manager to maintain on file.

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Name (please print)

---

Signature

---

Date

# Acknowledgment of Benefit Decline Form

I acknowledge by declining benefits as a new employee I will be categorized as a "late applicant" if I decide to join the Group Benefit Plan at a later date. As a late applicant, I may be subject to additional fees that may change without notice, in addition to providing medical evidence that may result in my application to join the Group Benefit Plan being refused due to ill health. In the event my late application to join the Group Benefit Plan is approved, I understand the Dental Coverage restriction of \$100 for the first 12 months

I understand that in the unfortunately event of personal illness/injury or medical emergency, or a death, illness, injury, medical emergency of, or urgent matter relating to certain relatives, that I will be on unpaid leave from Options Incorporated in accordance with (IAW) the Employment Standards Act 2000.

Please sign and return this form to the Administrative Manager to maintain on file.

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Name (please print)

---

Signature

---

Date

## 28. Termination of Employment

Terminations arise from involuntary termination by Options Incorporated (OI), resignation/retirement, and abandonment. All terminations shall be handled fairly and consistently. Employees who resign or retire from his or her employment voluntarily may be requested to participate in an exit interview.

OI will comply with the requirements of the Ontario Employment Standards Act, the Ontario Human Rights Code and all other applicable statutes with respect to all terminations.

### 28.1. Involuntary Termination

Involuntary terminations, either with or without cause, require the review and written pre-approval of the President of OI. Terminated employees agree to return all company property including all passwords, equipment, credit cards, and company documents prior to his or her departure.

### 28.2. Resignation/Retirement

Employees are requested to provide four (4) weeks notice to OI of their intent to terminate their employment in writing.

### 28.3. Abandonment of Employment

Employees who are absent unexpectedly from work are required to notify his or her manager in accordance with the Attendance Management procedure outlined in section 17.1. Employees who are absent from work for three (3) consecutive working days or more without notice will be presumed to have resigned from his or her position, and their employment will be terminated without notice.

When an employee is absent without notice, the **Administrative Manager** must take immediate steps to contact the person. If attempts to reach the employee are unsuccessful, the **Administrative Manager** must consult immediately with the President of OI to assure that all appropriate procedures are followed.

The President of OI must notify the employee of the intent to terminate employment in writing by registered mail. The letter may be sent on the second (2<sup>nd</sup>) day of absence.

## 28.4. Payroll at Termination of Employment

When employment with OI ends, the former employee will receive the following within five (5) calendar days following their last day and upon return of all OI property:

- regular salary for all periods worked up to the time of termination, which have not already been paid;
- vacation pay owing will be calculated as a percentage of applicable earnings during the vacation entitlement year less actual vacation paid. A vacation pay deficit will be subtracted from the final pay;
- any other amounts owing ie. expenses;
- less any amounts owing Options Incorporated per written agreement;
- final pay receipt/stub; &
- any other applicable documentation.

Dayforce submits ROEs electronically to Service Canada. Consultants can go to the Service Canada site to access their ROEs via the following link to obtain a copy of their ROE: [http://www.servicecanada.gc.ca/eng/ei/employers/view\\_roe.shtml](http://www.servicecanada.gc.ca/eng/ei/employers/view_roe.shtml)

## Contact Lens Safety Policy

References: A. Canadian Centre for Occupational Health and Safety dated Jan 18, 2012. Retrieved Mar 14, 2014 from

[http://www.ccohs.ca/oshanswers/prevention/contact\\_len.html](http://www.ccohs.ca/oshanswers/prevention/contact_len.html)

B. Segal, E. (1997) Contact Lenses and Chemicals. *Chemical Health & Safety*. 4(3), 33-37

C. American Optometric Association dated May 1998. Retrieved Mar 31, 2014 from

<http://www.aoa.org/patients-and-public/caring-for-your-vision/protecting-your-vision/guidelines-for-the-use-of-contact-lenses-in-industrial-environments>

D. Activity Summary – Hazard Investigation dated March 14, 2014

E. Canadian Centre for Occupational Health and Safety dated Jan 18, 2010. Retrieved Apr 22, 2014 from <http://www.ccohs.ca/oshanswers/prevention/ppe/glasses.html>

F. CSA Standard CAN/CSA-Z94.3-07, Eye and Face Protectors

### Responsibilities

1. A detailed review of References A to C revealed there are no universally accepted guidelines or agreement of the hazards presented by the use of contact lenses in the workplace. The resulting policy vacuum means OI and employees are equally responsible to ensure the safe use of contact lenses in the workplace.

### Identified Hazards

2. The investigation at Reference D identified potential eye damage caused by foreign bodies and chemicals while wearing contact lenses in conjunction with safety glasses in client weld and paint facilities. More specifically:
  - a. foreign bodies or chemicals such as sparks, splatter, fumes, and hot metal may become trapped in and/or behind both soft and hard contact lenses causing irritation and/or damage to the cornea and complicate removal; &
  - b. chemical splash may be more injurious when both soft and hard contact lenses are worn related to the removal of the lenses. If removal is delayed, first aid treatment may not be as effective and, in turn, the eye's exposure time to the chemical may be increased.

## Engineering Controls

3. Engineering controls are not a viable option to eliminate or control the identified hazards.

## Administrative Controls

4. To control the identified hazards, the following OI administrative controls are established:
  - a. ensure familiarity and follow both OI and client health and safety policies;
  - b. contact lens wearers must specifically inquire about contact lens safety policies and seek clarification of related hazards at client locations;
  - c. when contact lenses are worn and where an identified hazards exist, extra precautions are required to reduce the potential for injury. In the absence of client contact lens safety policies, alternatives are outlined in paragraph five (5) for individual consideration and decision on wearing contact lenses;
  - d. record contact lens wearers and the type of lenses used via the Employee Data Capture Form (F1);
  - e. contact lens wearers will be identify by name and lens type on the "First Aid" page of the Lunch Room to increase awareness, facilitate first aid, and potential follow-on treatment;
  - f. eye irrigation, proper use of eye wash station, and safety glasses fit training for all employees; &
  - g. lens wearers must always have a back-up pair eye of glasses readily available.

## Personal Protective Equipment

5. To control the identified hazards, personal protective equipment (PPE) may be required in accordance with client specific contact lens safety policies. Contact lenses do **NOT** provide eye protection and therefore are **NOT** a substitute for PPE. In the absence of client contact lens safety policies, the following applies in accordance with Reference E:
  - a. employees choosing to wear contact lenses must wear Class 1 Spectacles or Class 2 Goggles that seal to the face in facilities with similar hazards;
  - b. employees choosing to wear glasses must wear "over-the-glass" Class 1 Spectacles in facilities with similar hazards; &
  - c. employees choosing to wear prescription safety glasses must meet the requirements of Reference F including side shields integrated or permanently affixed to the frame in facilities with similar hazards.



## Isocyanate Safety Policy

References: A. Activity Summary – Hazard Investigation dated January 28, 2015  
B. Worksafe BC Bulletin – Isocyanates in industry dated 2010-05. Retrieved May 1, 2015 from [http://www2.worksafebc.com/i/posters/pdfs/2010/ws\\_2010\\_05.pdf](http://www2.worksafebc.com/i/posters/pdfs/2010/ws_2010_05.pdf)  
C. InfoTech Bulletin #6 – Product Safety Aspects of Madison Polyurethane Coatings, Madison Chemical Industries Inc. dated Jan 2007  
D. Toluene Diisocyanate (TDI) and Related Compounds Action Plan [RIN 2070-ZA14], U.S. Environmental Protection Agency dated Apr 2011  
E. Control Measures Guide – Labour Program, Human Resources and Social Development Canada dated Jul 16, 2013. Retrieved Feb 2, 2015 from [http://www.labour.gc.ca/eng/health\\_safety/pubs\\_hs/cmg.shtml](http://www.labour.gc.ca/eng/health_safety/pubs_hs/cmg.shtml)  
F. Isocyanates: Working Safely - California Department of Public Health dated May 2014. Retrieved May 1, 2015 from <http://www.cdph.ca.gov/programs/hesis/Documents/iso.pdf>

### Responsibilities

1. OI and employees are equally responsible to identify and communicate isocyanate hazards in the workplace to facilitate individual awareness and decision-making and avoid potential free/unreacted isocyanate exposure through education and alternative assessment methods.

### Identified Hazards

2. The investigation at Reference A identified potential for equipment/facility damage and/or injury resulting from the completion of ergonomic assessments and the use of associated instruments and tools in client Paint Shops and areas isocyanate is present. More specifically:
  - a. potential spark hazard from the use of mobile device, metal tape measure, digital camera, and/or digital force gauge in Paint Booths and/or Class A/Division A “Mix” Booths; &
  - b. potential hazards associated with isocyanate exposure and subsequent client PPE requirements.

### Isocyanates in Industry

3. As outlined at Reference B, isocyanates are very reactive chemicals that contain the isocyanate group (-NCO). They react with alcohols to produce polyurethane polymers. Isocyanates are the essential raw materials for polyurethane plastics.
4. The most commonly used isocyanates are toluene diisocyanate (TDI) and methylene bisphenyl isocyanate (MDI). TDI is used in the production of soft synthetic rubbers.

MDI is used in producing foams, hard synthetic rubbers (elastomers), and coatings.

5. Other isocyanates include naphthalene diisocyanate (NDI), Hexamethylene diisocyanate (HDI), and Isophorone diisocyanate (IPDI). NDI is used to produce elastomers. HDI and IPDI are both used in paints, coatings, leather finishings, and foams.
6. Isocyanates are used in the production of paints and coatings to create weather-resistant surfaces. They are also used to make building materials (for example, Styrofoam, flexible foams, adhesives, elastomers, and binders) and in the production of manufactured goods (for example, bedding, furniture, clothing, appliances, electronics, tires, and packaging).

### **Definitions**

7. Reference C notes “*free isocyanate*” evaporates from material when atomized in spray applications. Similarly, “*unreacted isocyanate*” refers to uncured materials containing the chemical as indicated at Reference D.

### **Health Effects of Isocyanate Exposure**

8. The potential health effects associated with exposure to free/unreacted isocyanates outlined at Reference E includes skin and eye irritation and skin and respiratory sensitization (develop an allergy). Direct skin contact may cause rashes, blistering, hardening and reddening of the skin. If the liquid splashes into the eyes, damage to the cornea can occur. Fully cured paints contain no free isocyanates and therefore, do not present any danger. Some of the most common symptoms experienced by workers exposed to isocyanates are:
  - a. excessive tear secretion;
  - b. dry throat;
  - c. dry cough;
  - d. chest pains; &
  - e. difficulty breathing.
9. Reference F notes that isocyanates are not likely to cause problems with human fertility, pregnancy, or fetal development.

### **First Aid**

10. In accordance with Reference B, washing and eyewash facilities must be available near areas where isocyanates are handled, and all workers must know how and when to use these facilities. Soap and water should be available at these facilities to treat contaminated skin.

- a. **If isocyanates enter the eyes**, follow these steps:
  - i. flush the eyes with lukewarm water immediately, for at least 30 minute;
  - ii. **remove contact lenses** after irrigating the eyes for a few minutes, and then resume irrigation; &
  - iii. see a doctor.
  
- b. **If isocyanates contact the skin**, follow these steps:
  - i. remove contaminated clothing. Contaminated clothing can be treated with a neutralizing mixture (10% isopropyl alcohol and 1% ammonia in water) and sent for laundering;
  - ii. wash skin with soap and water. Shower if necessary;
  - iii. discard contaminated items such as leather watch straps and shoes; &
  - iv. see a doctor if there is a chemical burn.
  
- c. **If isocyanates are swallowed**, follow these steps:
  - i. do not induce vomiting;
  - ii. have the worker drink water or milk to dilute the material in the stomach. Wash skin with soap and water. Shower if necessary; &
  - iii. transport the worker to the nearest hospital as soon as possible.
  
- d. **If a worker is overcome by inhaling isocyanates**, follow these steps:
  - i. move the worker to fresh air, and give the workers oxygen, if available;
  - ii. if the worker is having trouble breathing or is not breathing, start assisted ventilation using a pocket mask. Add oxygen to the mask, if available; &
  - iii. transport the worker to the nearest hospital as soon as possible.

## **Engineering Controls**

11. Engineering controls are not a viable option to eliminate or control the identified hazards.

## **Administrative Controls**

12. To control the identified hazards, the following OI administrative controls are established:
  - a. the client specific hazards and areas isocyanate is present will be clearly identified and communicated to the OI team via e-mail, team meeting, OI policy development, and new employee orientation to facilitate individual awareness and decision-making;
  - b. employees must request and review associated MSDS from the client to clearly understand the potential hazards;

- c. client safety signage takes precedence over anonymous worker/team member/team leader personal and/or contradictory safety opinions;
- d. Employees will avoid potential free/unreacted isocyanate exposure through alternative assessment methods including:
  - i. can a historical video/photos be used or reference;
  - ii. can the worker be video taped completing the task from a safe vantage point;
  - iii. can the worker provide tools used to be weighted/measured? Are the materials available in a store/stock room;
  - iv. can a subjective interview with a worker be conducted to facilitate a high level understanding of the required tasks. The interview can identify measurements or additional details that perhaps the worker can provide by weighing/measuring parts;
  - v. can the postures used be simulated by the worker (perhaps during the interview); &
  - vi. following these data collection methods, the report can include a disclaimer.
- e. in rare situations when an employee believes potential hazard exposure is unavoidable, the appropriate Supervising and/or Managing Ergonomist will be consulted as far in advance as practical to discuss the circumstances and identify alternative assessment methods. Employees will not unilaterally decide to potentially expose themselves to free/unreacted isocyanate;
- f. pregnant employees will avoid potential exposure to free/unreacted isocyanate as a precautionary measure; &
- g. in rare situations when an employee cannot avoid the potential hazard, mobile devices (cell phones), metal tape measure, digital cameras, and/or digital force gauges are not allowed into Gas Fill, Paint and/or "Mix" Booths to avoid potential ignition of vapors/spray by static electricity discharge. Metal equipment must be a grounded and only "non-sparking" tools and/or equipment may be used. If a force measurement is required in any of these areas, only an analog force gauge is authorized for use.

### **Personal Protective Equipment**

13. To control the identified hazards, personal protective equipment (PPE) may be required in rare situations when not practicable or feasible to use alternative assessment methods, the client must provide the appropriate respiratory personal protective equipment (PPE) and training in consultation with OI management.

## Consulting Safety Policy

Reference: Activity Summary – Accident Investigation dated October 14, 2016

### Responsibilities

1. The Options Incorporated (OI) Safety Culture is a shared care and concern for hazard identification, realistic and adaptable protection from identified hazards, and continual situational assessment and evaluation. The purpose of OI Safety Culture is to promote organizational and individual learning that focuses on effective and safe decision-making. In any given situation, OI and employees are equally responsible to identify potential hazards, evaluate realistic and adaptable protections from identified hazards (ie. hazard avoidance strategies), and communicate potential hazards in the workplace.

### Identified Hazards

2. The investigation at Reference identified potential for personal injury and/or damage to vehicles, equipment, and/or facilities resulting from a client request to handle equipment while providing on-site ergonomic support. More specifically:
  - a. potential hazards associated with transporting client/vendor equipment via personal vehicle;
  - b. potential hazards associated with moving client/vendor equipment;
  - c. potential hazards associated with assembling, building, and/or installing client/vendor equipment; &
  - d. potential hazards associated with awkward postures, force gauge coupling, and/or quantifying unusual or high forces during data collection.

### Background

3. OI liabilities mitigation and protection are predicated on operating as a professional services company that offers customized, knowledge-based services to clients. To this end, OI does **NOT** offer services to transport, move, build, assemble, and/or install client/vendor equipment ie. these tasks are not listed under the “Services” tab of the OI website nor identified as an essential task in the Physical and Cognitive Demands Descriptions for Interns, Ergonomic Consultants, Senior Ergonomic Consultants, Supervising Ergonomists, or Managing Ergonomists. Consequently, no infrastructure has been developed to facilitate these services in the form of training, qualifications, policies, hazards identification, risk assessments, PPE, and/or tools.

## Engineering Controls

4. Engineering controls are not a viable option to eliminate or control the identified hazards.

## Administrative Controls

5. To control the identified hazards, the following OI administrative controls are established:
  - a. clients are wholly responsible to correct infrastructure and equipment deficiencies guided by their internal policies and resources;
  - b. employees are insured and thus may push, pull, lift, carry, and/or use tools for data collection purposes in the completion of assessments. While collecting data for assessment purposes, employees must be cautious not to overexert and/or avoid repetition in order to minimize exposure to awkward postures and/or unusual/high forces. It's sufficient to simply categorize such instances as "high forces" or "forces exceed recommended guidelines". For a detailed understanding of the physical expectations/requirements of all Interns, Ergonomic Consultants, Senior Ergonomic Consultants, Supervising Ergonomists, or Managing Ergonomists, please reference the appropriate Physical and Cognitive Demands Descriptions at Annexes D through G;
  - c. heightened awareness on a micro level of force gauge coupling specifically the contact point and stability throughout the entire measurement cycle. Similarly from a meso perspective, ensure situational awareness to eliminate contact or impact to persons and/or products/parts throughout the entire measurement cycle;
  - d. adjustments to client/vender equipment may be made by employees within manufacturer specifications if the equipment is present and installed ie. lift a monitor to adjust a riser, reposition a keyboard, and/or properly fit a chair;
  - e. manufacturer provided/approved tools maybe used by employees to adjust client/vender equipment within manufacturer specifications if the equipment is present and installed ie. sit stand units may require an allen key to adjust;
  - f. employees will not accept responsibility to transport, move, assemble, build, and/or install client/vendor equipment ie. cannot assemble or build equipment out of the box; &
  - g. situations when an employee believes potential hazard exposure is unavoidable, the appropriate Supervising and/or Managing Ergonomist will be consulted as far in advance as practical to discuss the circumstances and identify alternative assessment methods. If in doubt, contact the appropriate Supervising and/or Managing Ergonomist.

**Physical Demands Description with  
Cognitive Demands Analysis**

**Company Name:** Options Incorporated

**Company Address:** 22 Westmount Road, Guelph Ontario

**Date of Evaluation:** January 25, 2017

**Position Analyzed:** Ergonomic Consultant

**Date of Update:** August 30, 2021

**Shift Operation:** - Typically: 8hrs/shift, but up to 44hrs/week  
- 5 days/week; typically Monday to Friday  
- Variable start times depending on client demands  
- One 30 minute lunch

**Contact Person:** Kirsti MacAulay, CCPE  
Principal Ergonomist

An Ergonomic Consultant is a professional position that requires a consultant to identify and assess ergonomic hazards in various workplaces (i.e. office settings, nuclear industries, health care, automotive, manufacturing, food, and municipalities etc) while producing technical reports in a proficient and timely manner. Specifically this includes completing data collection, taking measurements and forces, analyzing data and interpreting results, followed by compiling detailed analysis/reports. Consultants are also required to assemble solutions, within client and company driven parameters. Ergonomic Consultants may also be required to instruct and facilitate training sessions including setup of computer / visual audio equipment. Due to the nature of consulting, Ergonomic Consultants are required to conduct themselves professionally at all times and effectively interact with diverse clientele while promoting safe, healthy and ergonomic inspired workplaces. They may be required to manage multiple projects simultaneously and adjust support levels and timelines to adhere to client and company deadlines.

An Ergonomic Consultant is required to have a valid drivers' license as they will be required to support clients at varying locations, typically along the Highway 401 corridor. A professional in this position may be required to work in a close team environment (i.e. embedded client support) or independently depending on the project they are supporting. This may be required on either a physical (face to face) or virtual (remote) basis.

Due to the inherent dynamic nature of this position, the required physical demands are variable on a daily basis but will typically include at least two of the outlined essential tasks. However, within each week a professional in this position could be required to focus on a single task or all four of the essential tasks outlined within one day. The variability and flexibility will depend on the required client support, project deadlines, and experience level of the consultant.

Task Number	Essential Tasks
1	Collecting data and observing within various work environments
2	Completing data analysis and report writing
3	Instructing and facilitating training sessions
4	Travelling between and to client locations

## Physical Demands Analysis: Summary

**Position Analyzed:** Ergonomic Consultant

**Date of Update:** August 30, 2021

The below chart is a summary of the overall physical demands required by a professional in this position. Details on each of these parameters are presented in the remainder of the document.

Parameter	Requirements				
	Not Required	Seldom (1-5%)	Occasional (6-33%)	Frequent (34-66%)	Constant (67-100%)
Stand			X	—————→	X
Walk		X	—————→	X	
Sit			X	—————→	X
Stoop/Bend		X			
Twist		X			
Kneel/Crouch		X			
Climb		X			
Lift		X	—————→	X	
Carry		X	—————→	X	
Push/Pull		X	—————→	X	
Handling/Power Grip			X	—————→	X
Fingering/Pinch Grip			X	—————→	X
<b>Vertical Reach</b>					
Below Knuckle			X		
Knuckle to Shoulder					X
Above Shoulder			X		
<b>Horizontal Reach</b>					
Beyond functional reach (45 cm)			X		



**Physical Demands Summary**

**Task #1:** Collecting data and observing within various work environments

**Details:** Depending on the project being supported, the Ergonomic Consultant could be required to complete data collection at single or various client locations. Collecting data may include, but is not limited to, taking photographs and videos, measuring vertical and horizontal reaches with a tape measure, and taking various force measurements using a force gauge or weights using a scale. Consultants are required to take a hands on approach within the workplaces being observed. As a result, to obtain these measurements and collect this data they will reach to required areas, lift/weigh required objects, push/pull dollies, carts, hoists, lift assists, parts, or other equipment to capture forces. While collecting data, Consultants must be cautious not to overexert and/or avoid repetition in order to minimize exposure to awkward postures and/or unusual/high forces. It is deemed sufficient to simply categorize such instances as “high forces” or “forces exceed recommended guidelines”. The Ergonomic Consultant may also be required to adjust existing equipment (chairs, keyboard trays, etc.) to support ideal results. The Consultant will complete all data collection while wearing any client/environment specific Personal Protective Equipment. Due to the varying nature of projects, postures and mobility demands will vary depending on the project supported. The duration of data collection within a day typically ranges from 60 minutes to 4 hours prolonged standing, with periods of intermittent walking around the work area.

<b>Reach</b>			
<i>Vertical Reach - Range (cm)</i>	<i>Vertical Reach - Usual (cm)</i>	<i>Horizontal Reach - Range (cm)</i>	<i>Horizontal Reach - Usual (cm)</i>
0 - 200 cm	30 - 185 cm	0 - 100 cm	0 - 70 cm

<b>Lifting Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm)</i>	<i>Weight (kg)</i>	<i>Times/cycle</i>
<i>Horizontal Load Distance (distance of knuckles away from body)</i>	Variable, but typically at distance of comfort	Notebook: <1 kg	Variable as directly dependent on project being supported.  Consultants must consider client requests and structure their data collection to avoid repetitive exposure to lifting demands.
<i>Vertical Load Distance (height of load at start of lift)</i>	Notebook, Measurement Tools: typically between 0 - 90 cm  Objects being measured: Variable depending on object and specific task demands/environment	Measurement Tools: force gauges, tape measure, cameras: Up to 4.5 kg  Objects being measured: variable with potential to lift loads up to 30 kg provided safe lifting is feasible. Otherwise, forces above 21kg will be logged as “high forces” or “forces exceed recommended guidelines”	
<i>Vertical Lifting Distance (distance that the load is lifted through)</i>	Height of comfort (typically between waist and chest)		

<b>Carrying Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm,m)</i>	<i>Weight (kg)</i>	<i>Times/cycle</i>
<i>Vertical Position of Load</i>	Height of comfort (typically between waist and chest)	Notebook: <1 kg  Measurement Tools: force gauges, tape measure, cameras: Up to 4.5 kg	Variable as directly dependent on project being supported.  Consultants have access to rolling bags to transport equipment instead of carrying it.
<i>Horizontal Position of Load</i>	Distance of comfort		
<i>Distance Carried</i>	Variable: typically <1 to 500 m but could be around client facility.		

<b>Pushing/Pulling Parameters</b>			
<i>Handle Height (cm)</i>	<i>Initial (kg)</i>	<i>Distance of Push (up to 2m, 2-7.5m, &gt;7.5m)</i>	<i>Times/cycle</i>
1. Office/plant doors: 100-110 cm  2. Objects measured: Various heights (parts/equipment/dollies) depending on project demands	1. Doors: 1. 3 to 5 kg  2. Objects measured: variable with potential to push/pull loads up to 41 kg provided safe pushing/pulling is feasible. Otherwise, forces above 27kg will be logged as “high forces” or “forces exceed recommended guidelines”	1. Doors: Minimal <1 m  2. Objects measured: Variable	1. Doors: As needed  2. Objects measured: Variable, Consultants must consider client requests and structure their data collection to avoid repetitive exposure to pushing/pulling demands.

<b>Postures</b>			
<i>Upper Extremity</i>		<i>Lower Extremity</i>	
<i>Neck:</i>	0 - 45 deg flex, 90 deg rot'n, 20 deg ext	<i>Torso:</i>	0 - 90 deg flex
<i>Shoulder:</i>	0 - 180 deg flex, 0 - 180 deg abduct, 20 deg ext	<i>Hip/Knee/Ankle:</i>	Used to sit, stand, walk, crouch, climb and/or squat
<i>Elbow:</i>	0 - 180 deg flex/ext		
<i>Wrist:</i>	+/- 30 deg flex/ext/dev'n		
<i>Finger Demands/Dexterity</i>		<i>General Demands</i>	
<i>Hand</i>	Grip - Power and Pinch	<i>Mobility</i>	Walk
<i>Fingers</i>	Handling and Fine Fingering	<i>Other</i>	Kneeling and Climbing stairs

## Physical Demands Summary

### Task #2:

Completing data analysis and report writing

**Details :** Following collection of data, the Ergonomic Consultant is responsible for analyzing and/or collating the information. Once the analysis is completed, the consultant will prepare a report consistent the scope of the project. All reports are completed electronically through use of word processing, spreadsheets, database software, as well as Internet resources. The equipment (laptop, desktop, chair) and environment (head office, remote, client location) will vary depending on the project and client being supported. As a result, the Ergonomic Consultant is required to set up their computer workstation in the most ideal ergonomic manner based on available equipment provided. Due to the varying nature of project timelines, deliverables, and deadlines, the duration of sustained data analysis and report writing will vary. As the Ergonomic Consultant has some control over their working postures within this task, the duration of sustained seated postures within a day is typically 60 minutes before a postural break is taken. Depending on the nature of the project and work day, the Consultant may resume seated postures following postural breaks for the majority of their day.

Reach			
Vertical Reach - Range (cm)	Vertical Reach - Usual (cm)	Horizontal Reach - Range (cm)	Horizontal Reach - Usual (cm)
30 - 160 cm	75 - 140 cm	0 - maximum arm's reach	0 - 50 cm

Lifting Parameters			
Parameter	Measurement (cm)	Weight (kg)	Times/cycle
Horizontal Load Distance (distance of knuckles away from body)	Distance of comfort	Notebook: <1 kg Laptop Computer/Supplies: 4.5 kg	Variable Up to 4 times per shift
Vertical Load Distance (height of load at start of lift)	Notebooks, reference materials, Laptop Computer and accessories: varies from 30 - 90cm		
Vertical Lifting Distance (distance that the load is lifted through)	Variable but typically onto desk or working surface/laptop stand.		

Carrying Parameters			
Parameter	Measurement (cm,m)	Weight (kg)	Times/cycle
Vertical Position of Load	Height of comfort	Notebook: <1 kg	Variable as directly dependent on project/client being supported.  Consultants have access to rolling bags to transport equipment instead of carrying it.
Horizontal Position of Load	Distance of comfort	Laptop Computer/ Supplies: 4.5 kg	
Distance Carried	Variable: Typically <1 to 1000 m	*May be required while climbing stairs into/out of working location	

Pushing/Pulling Parameters			
Handle Height (cm)	Initial (kg)	Distance of Push (up to 2m, 2-7.5m, >7.5m)	Times/cycle
Roller bag: variable, 70 - 100 cm	Variable: < 5kg	Variable: Typically <1 to 1000 m	Variable: Up to 4 times per shift

Postures			
Upper Extremity		Lower Extremity	
Neck:	0 - 45 deg flex and rot'n	Torso:	0 - 90 deg flex, primarily when in seated postures
Shoulder:	0 - 120 deg flex and abduct	Hip/Knee/Ankle:	Used to sit, stand, and squat/crouch
Elbow:	0 - 180 deg flex/ext		
Wrist:	+/- 20 deg flex/ext/dev'n		
Finger Demands/Dexterity		General Demands	
Hand	Grip - Power and Pinch	Mobility	Sitting and Walking
Fingers	Handling and Fine Fingering	Other	Standing, crouching, squatting, and climbing stairs

## Physical Demands Summary

**Task #3:** Instructing and facilitating training sessions

**Details:** The Ergonomic Consultant may be required to instruct and facilitate training sessions at various client locations. Depending on the client, this may only include setting up computer but could also include setting up the audio/visual equipment, as well as moving chairs and tables to create a positive training layout. Training sessions may be delivered at client locations in conference rooms, at hotel type locations, or via webinar format. Throughout instructing and facilitating the training session, the Consultant may be required to provide demonstrations of tasks, ideal work methods and various postures. As a result, the postures and movements required will vary depending on the topic of training delivered. Depending on the type and duration of training session, the Consultant may stand/walk for between 1 - 2 hours at a time while presenting material before a 15 minute break. For full day training sessions they would be required to stand for the duration of the session other than 15 min breaks and a lunch break.

<b>Reach</b>			
<i>Vertical Reach - Range (cm)</i>	<i>Vertical Reach - Usual (cm)</i>	<i>Horizontal Reach - Range (cm)</i>	<i>Horizontal Reach - Usual (cm)</i>
0 - 200 cm	75 - 185 cm	0 - maximum arm's reach	0 - 50 cm

<b>Lifting Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm)</i>	<i>Weight (kg)</i>	<i>Times/cycle</i>
<i>Horizontal Load Distance</i> <i>(distance of knuckles away from body)</i>	Distance of comfort	Laptop computer, handouts, InFocus machine: Up to 6 kg	Variable Up to 4 times per shift
<i>Vertical Load Distance</i> <i>(height of load at start of lift)</i>	Notebooks, reference materials, Laptop Computer and accessories: varies from 30 - 90cm		
<i>Vertical Lifting Distance</i> <i>(distance that the load is lifted through)</i>	Variable but typically onto table or working surface/lecturn.		

<b>Carrying Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm,m)</i>	<i>Weight (kg)</i>	<i>Times/cycle</i>
<i>Vertical Position of Load</i>	Height of comfort	Laptop Computer/ Supplies: Up to 6 kg  <i>*May be required while climbing stairs into/out of working location</i>	Variable Up to 4 times per shift  Consultants have access to rolling bags to transport items instead of carrying them.
<i>Horizontal Position of Load</i>	Distance of comfort		
<i>Distance Carried</i>	Variable: Typically <1 to 1000 m		

<b>Pushing/Pulling Parameters</b>			
<i>Handle Height (cm)</i>	<i>Initial (kg)</i>	<i>Distance of Push</i> <i>(up to 2m, 2-7.5m, &gt;7.5m)</i>	<i>Times/cycle</i>
1. Doors (100 - 110 cm) 2. Overhead screen (up to 200 cm) 3. Rolling laptop / office bag (70 - 100 cm)	1. Doors: 3 to 5 kg 2. Overhead screen: 1 to 2 kg 3. Rolling bag: <5 kg	1. Doors: Minimal <1 m 2. Overhead screen: <1 m 3. Rolling bag: <1 to 1000 m	Variable Up to 4 times per shift

<b>Postures</b>			
<i>Upper Extremity</i>		<i>Lower Extremity</i>	
<i>Neck:</i>	0 - 45 deg flex, 0 - 30 deg ext, 0 - 45 degrees rotation	<i>Torso:</i>	0 - 90 deg flex, primarily when in seated postures
<i>Shoulder:</i>	0 - 180 deg flex, 0 - 180 deg abduct	<i>Hip/Knee/Ankle:</i>	Used to sit, stand, walk, climb and squat/crouch
<i>Elbow:</i>	0 - 180 deg flex/ext		
<i>Wrist:</i>	+/- 30 deg flex/ext/dev'n		
<i>Finger Demands/Dexterity</i>		<i>General Demands</i>	
<i>Hand</i>	Grip - Power and Pinch	<i>Mobility</i>	Standing and Walking
<i>Fingers</i>	Handling and Fine Fingering	<i>Other</i>	Sitting, crouching, squatting, and climbing stairs

## Physical Demands Summary

### Task #4:

Travelling between and to client locations

**Details:** Depending on the projects being supported, the Ergonomic Consultant may be required to travel between client locations on the same day. Travelling between clients may require the Consultant to load/unload their vehicle with equipment/supplies needed to support the data collection or training session. Travelling distances will vary depending on client support, up to 60 minute sustained sitting tolerances may be required.

Reach			
Vertical Reach - Range (cm)	Vertical Reach - Usual (cm)	Horizontal Reach - Range (cm)	Horizontal Reach - Usual (cm)
30 - 200 cm	85 - 105 cm	0 - 75 cm	0 - 55 cm

Lifting Parameters			
Parameter	Measurement (cm)	Weight (kg)	Times/cycle
Horizontal Load Distance (distance of knuckles away from body)	Up to 65 cm	Equipment/Supplies/Laptop/Personal bags: Up to 6 kg	Variable
Vertical Load Distance (height of load at start of lift)	Varies, typically from 30 - 90cm		
Vertical Lifting Distance (distance that the load is lifted through)	30 - 120 cm		

Carrying Parameters			
Parameter	Measurement (cm,m)	Weight (kg)	Times/cycle
Vertical Position of Load	Height of comfort	Equipment/Supplies/Laptop/Personal bags: Up to 6 kg	Variable Up to 4 times per shift
Horizontal Position of Load	Distance of comfort		Consultants have access to rolling bags to transport items instead of carrying them
Distance Carried	Variable: Typically <1 to 1000 m		

Pushing/Pulling Parameters			
Handle Height (cm)	Initial (kg)	Distance of Push (up to 2m, 2-7.5m, >7.5m)	Times/cycle
1. Open/close vehicle doors (80 - 110 cm)	1. 3 to 5 kg	1. Minimal, <1 m	Variable, up to 4 trips per shift.
2. Shifting gears (60 cm)	2. 1 to 2 kg	2. Minimal, <1 m	
3. Engaging parking brake (60 - 70 cm)	3. 1 to 2 kg	3. Minimal, <1 m	
4. Office/plant doors (100 - 110 cm)	4. 3 to 5 kg	4. Minimal, <1 m	
5. Rolling laptop / Office Bag (90 - 100 cm)	5. <5 kg	5. <1 to 1000 m	

Postures			
Upper Extremity		Lower Extremity	
Neck:	0 - 45 deg flex, 0 - 30 deg ext, 0 - 45 deg rot'n	Torso:	0 - 90 deg flex, primarily when in seated/driving postures
Shoulder:	0 - 180 deg flex, 0 - 180 deg abduct	Hip/Knee/Ankle:	Used to sit, stand, walk and operate pedals to drive vehicle
Elbow:	0 - 180 deg flex/ext		
Wrist:	+/- 30 deg flex/ext/dev'n		
Finger Demands/Dexterity		General Demands	
Hand	Grip - Power and Pinch	Mobility	Sitting
Fingers	Handling and Fine Fingering	Other	Climbing in/out of vehicle

## Summary of Additional Specific Requirements

Cognitive Demands	Required	Comments or Details
<b>Hearing</b>		
Conversation	X	With co-workers, management team and clients
Other Sounds	X	Announcements and alarms
<b>Vision</b>		
Near	X	Computer work, paperwork, and data collection
Far	X	Navigating throughout client locations and driving
Colour	X	Computer work and during data collection
<b>Perception</b>		
Spatial Form	X	Data collection
Feeling	X	Data collection
Reading	X	Computer work, paperwork, and driving
Writing	X	Data collection, paperwork and analysis
Speech	X	With co-workers, management team and clients

Environmental Demands	Required	Comments or Details
Air borne particles	X	May be exposed depending on client (i.e. health care, hospitals)
Noise	X	Hearing protection may be required depending on the client
Hazardous machines/tools	X	May be exposed depending on client
Radiant/thermal energy	X	May be exposed depending on client
Congested work site	X	May be exposed depending on client

Conditions of Work	Required	Comments or Details
Work alone	X	May support independent projects
Work Independently but in a team	X	May support independent projects, but works as a larger part of a consulting team
Deadline pressure	X	Required to meet client deadlines
Operate equipment/machinery	X	Tools required for data collection and analysis (i.e. camera, force gauge, scale, tape measure, computer)
Shift work	X	Typically day shift support, but afternoon or night support may be required depending on client requests

Personal Protective Equipment	Required	Comments or Details
Safety glasses	X	May be required depending on client
Hard hat	X	May be required depending on client
Jacket/sleeves/paint suit	X	May be required depending on client
Safety shoes	X	May be required depending on client
Hearing protection	X	May be required depending on client
Safety vest	X	May be required depending on client
Gloves	X	May be required depending on client
Face mask	X	May be required depending on client

## Psychological / Cognitive Job Demands Analysis

**Job Title:** Ergonomic Consultant

Category	Description / Definition	Requirements
Degree of Self-Supervision Required	The ability to work effectively without supervision. When required, the worker is expected to exercise good problem solving and judgement.	Frequent self-supervision required following the Supervisor providing work direction.
Deadline Pressures (time pressure)	The extent to which work tasks are expected to be completed within a given time period or the extent to which a fast work pace is required because of the nature of the work or work volume.	Able to manage frequent pressure to meet deadlines, work within time constraints, and/or support a high volume of work and moderately fast pace of work. Able to complete tasks as directed within timelines.
Attention to Detail	The ability to support work tasks that require attention to or concentration on details of information. This demand implies that insufficient attention to detail will result in work errors and/or inefficiencies.	Significant attention to detail or concentration is required for many tasks or intense attention to detail or concentration required for some tasks. Able to apply <i>meso level</i> common sense/logic checks to <i>micro detail</i> .
Performance of multiple tasks	The ability to perform and/or monitor more than one task at a time and to be able to judge when tasks require attention. The ability to prioritize tasks and manage time effectively (juggle various tasks efficiently) is required.	Responsible for multiple tasks, with some time management skill and judgement required for successful ongoing management of priorities.
Exposure to distracting stimuli	The ability to perform work duties without distraction from visual, auditory or other sensory stimuli. May include verbal conversations of colleagues in an open office area, phones ringing, and movement of people.	Able to work within environments with moderate degree of distracting stimuli
Need to work co-operatively with others	The ability to work co-operatively with others. This may include team projects, shared job duties, interacting with Leadership, etc. This requires one to have good communication skills, good teamwork and interpersonal skills, be open minded, diplomatic or have good negotiation skills.	Able to work in close co-operation with others when required.
Exposure to emotional or confrontational situations	Exposure to situations in which a client or the public may be emotional or confrontational and the consultant is required to interact with the individual in order to complete a job requirement. These scenarios may be in person or over the telephone.	Infrequent exposure to emotional or confrontational circumstances or individuals with whom the consultant must interact in order to complete job requirements.
Responsibility and accountability	The extent of liability or safety risk that could result if the consultant does not exercise appropriate judgement or attention, or follow policies, procedures, and processes during the performance of job tasks.	Errors in judgement or attention would result in liability or risks ranging from inconvenience to serious legal consequences, significant expense, or health and safety risks to clients, colleagues, or the company.
Reading literacy	The ability to read and comprehend English text and written documents.	A high degree of reading literacy is required to read reports, references, or other documents with a high degree of comprehension
Written literacy	The ability to create English text within generally accepted grammar and spelling norms.	Able to create memos, reports, or any communications with accurate spelling, grammatical construction, clarity, and/or careful wording.
Numerical Skills	The ability to process and analyze numerical information even if the calculation is performed electronically.	Able to use complex arithmetic operations such as division, multiplication, percentages, ratios and begin to apply abstract mathematical formulae e.g., statistical comparisons, co-relating data sets. Able to apply <i>meso level</i> common sense/logic checks to <i>micro detail</i> .

## Psychological / Cognitive Job Demands Analysis

**Job Title:** Ergonomic Consultant

Category	Description / Definition	Requirements
Computer literacy	The extent to which a job requires the ability to use computer technology	Able to use standard computer programs (e.g. Excel, WORD, Power Point, video conferencing) and smart phones (text, emails, Apps) at an advanced level and apply problem solving skills as required.
Verbal Communication	The ability to clearly comprehend and express ideas and information in spoken English.	Communication skills are required to comprehend and communicate information fluently e.g. to peers, supervisors, clients.
Memory	The ability to retrieve and recall information on demand that has been previously learned.	Able to recall information that is applied to work tasks on a regular basis as well as recall information that harder to remember because it is recalled infrequently.

**Physical Demands Description with  
Cognitive Demands Analysis**

**Company Name:** Options Incorporated

**Company Address:** 22 Westmount Road, Guelph Ontario

**Date of Evaluation:** September 2021

**Position Analyzed:** Senior Ergonomic Consultant

**Shift Operation:** - Typically: 8hrs/shift, but up to 44hrs/week  
- 5 days/week; typically Monday to Friday  
- Variable start times depending on client demands  
- One 30 minute lunch

**Contact Person:** Kirsti MacAulay, CCPE  
Principal Ergonomist

A Senior Ergonomic Consultant is a professional position that requires a consultant to identify and assess ergonomic hazards in various workplaces (i.e. office settings, nuclear industries, health care, automotive, manufacturing, food, and municipalities etc) while producing technical reports in a proficient and timely manner. Specifically this includes completing data collection, taking measurements and forces, analyzing data and interpreting results, followed by compiling detailed analysis/reports.

Consultants are also required to assemble solutions, within client and company driven parameters. Senior Ergonomic Consultants may also be required to instruct and facilitate training sessions including setup of computer / visual audio equipment. Due to the nature of consulting, Senior Ergonomic Consultants are required to conduct themselves professionally at all times and effectively interact with diverse clientele while promoting safe, healthy and ergonomic inspired workplaces. They may be required to manage multiple projects simultaneously and adjust support levels and timelines to adhere to client and company deadlines.

A Senior Ergonomic Consultant is required to have a valid drivers' license as they will be required to support clients at varying locations, typically along the Highway 401 corridor. A professional in this position may be required to work in a close team environment (i.e. embedded client support) or independently depending on the project they are supporting. This may be required on either a physical (face to face) or virtual (remote) basis.

Due to the inherent dynamic nature of this position, the required physical demands are variable on a daily basis but will typically include at least two of the outlined essential tasks. However, within each week a professional in this position could be required to focus on a single task or all four of the essential tasks outlined within one day. The variability and flexibility will depend on the required client support, project deadlines, and experience level of the consultant.

Task Number	Essential Tasks
1	Collecting data and observing within various work environments
2	Completing data analysis and report writing
3	Instructing and facilitating training sessions
4	Travelling between and to client locations



## Physical Demands Analysis: Summary

**Position Analyzed:** Senior Ergonomic Consultant

The below chart is a summary of the overall physical demands required by a professional in this position. Details on each of these parameters are presented in the remainder of the document.

Parameter	Requirements				
	Not Required	Seldom (1-5%)	Occasional (6-33%)	Frequent (34-66%)	Constant (67-100%)
Stand			X	—————→	X
Walk		X	—————→ X		
Sit			X	—————→	X
Stoop/Bend		X			
Twist		X			
Kneel/Crouch		X			
Climb		X			
Lift		X	—————→ X		
Carry		X	—————→ X		
Push/Pull		X	—————→ X		
Handling/Power Grip			X	—————→ X	
Fingering/Pinch Grip			X	—————→	X
<b>Vertical Reach</b>					
Below Knuckle			X		
Knuckle to Shoulder					X
Above Shoulder			X		
<b>Horizontal Reach</b>					
Beyond functional reach (45 cm)			X		

**Physical Demands Summary**

**Task #1:** Collecting data and observing within various work environments

**Details:** Depending on the project being supported, the Senior Ergonomic Consultant could be required to complete data collection at single or various client locations. Collecting data may include, but is not limited to, taking photographs and videos, measuring vertical and horizontal reaches with a tape measure, and taking various force measurements using a force gauge or weights using a scale. Senior Ergonomic Consultants are required to take a hands on approach within the workplaces being observed. As a result, to obtain these measurements and collect this data they will reach to required areas, lift/weigh required objects, push/pull dollies, carts, hoists, lift assists, parts, or other equipment to capture forces. While collecting data, Senior Ergonomic Consultants must be cautious not to overexert and/or avoid repetition in order to minimize exposure to awkward postures and/or unusual/high forces. It is deemed sufficient to simply categorize such instances as “high forces” or “forces exceed recommended guidelines”. The Senior Ergonomic Consultant may also be required to adjust existing equipment (chairs, keyboard trays, etc.) to support ideal results. The Senior Ergonomic Consultant will complete all data collection while wearing any client/environment specific Personal Protective Equipment. Due to the varying nature of projects, postures and mobility demands will vary depending on the project supported. The duration of data collection within a day typically ranges from 60 minutes to 4 hours prolonged standing, with periods of intermittent walking around the work area.

<b>Reach</b>			
<i>Vertical Reach - Range (cm)</i>	<i>Vertical Reach - Usual (cm)</i>	<i>Horizontal Reach - Range (cm)</i>	<i>Horizontal Reach - Usual (cm)</i>
0 - 200 cm	30 - 185 cm	0 - 100 cm	0 - 70 cm

<b>Lifting Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm)</i>	<i>Weight (kg)</i>	<i>Times/cycle</i>
<i>Horizontal Load Distance (distance of knuckles away from body)</i>	Variable, but typically at distance of comfort	Notebook: <1 kg	Variable as directly dependent on project being supported.  Senior Ergonomic Consultants must consider client requests and structure their data collection to avoid repetitive exposure to lifting demands.
<i>Vertical Load Distance (height of load at start of lift)</i>	Notebook, Measurement Tools: typically between 0 - 90 cm  Objects being measured: Variable depending on object and specific task demands/environment	Measurement Tools: force gauges, tape measure, cameras: Up to 4.5 kg  Objects being measured: variable with potential to lift loads up to 30 kg provided safe lifting is feasible. Otherwise, forces above 21kg will be logged as “high forces” or “forces exceed recommended guidelines”	
<i>Vertical Lifting Distance (distance that the load is lifted through)</i>	Height of comfort (typically between waist and chest)		

<b>Carrying Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm,m)</i>	<i>Weight (kg)</i>	<i>Times/cycle</i>
<i>Vertical Position of Load</i>	Height of comfort (typically between waist and chest)	Notebook: <1 kg  Measurement Tools: force gauges, tape measure, cameras: Up to 4.5 kg	Variable as directly dependent on project being supported.
<i>Horizontal Position of Load</i>	Distance of comfort		Senior Ergonomic Consultants have access to rolling bags to transport equipment instead of carrying it.
<i>Distance Carried</i>	Variable: typically <1 to 500 m but could be around client facility.		

<b>Pushing/Pulling Parameters</b>			
<i>Handle Height (cm)</i>	<i>Initial (kg)</i>	<i>Distance of Push (up to 2m, 2-7.5m, &gt;7.5m)</i>	<i>Times/cycle</i>
1. Office/plant doors: 100-110 cm  2. Objects measured: Various heights (parts/equipment/dollies) depending on project demands	1. Doors: 1. 3 to 5 kg  2. Objects measured: variable with potential to push/pull loads up to 41 kg provided safe pushing/pulling is feasible. Otherwise, forces above 27kg will be logged as “high forces” or “forces exceed recommended guidelines”	1. Doors: Minimal <1 m  2. Objects measured: Variable	1. Doors: As needed  2. Objects measured: Variable, Senior Ergonomic Consultants must consider client requests and structure their data collection to avoid repetitive exposure to pushing/pulling demands.

<b>Postures</b>			
<i>Upper Extremity</i>		<i>Lower Extremity</i>	
<i>Neck:</i>	0 - 45 deg flex, 90 deg rot'n, 20 deg ext	<i>Torso:</i>	0 - 90 deg flex
<i>Shoulder:</i>	0 - 180 deg flex, 0 - 180 deg abduct, 20 deg ext	<i>Hip/Knee/Ankle:</i>	Used to sit, stand, walk, crouch, climb and/or squat
<i>Elbow:</i>	0 - 180 deg flex/ext		
<i>Wrist:</i>	+/- 30 deg flex/ext/dev'n		
<i>Finger Demands/Dexterity</i>		<i>General Demands</i>	
<i>Hand</i>	Grip - Power and Pinch	<i>Mobility</i>	Walk
<i>Fingers</i>	Handling and Fine Fingering	<i>Other</i>	Kneeling and Climbing stairs

## Physical Demands Summary

### Task #2:

Completing data analysis and report writing

**Details:** : Following collection of data, the Senior Ergonomic Consultant is responsible for analyzing and/or collating the information. Once the analysis is completed, the consultant will prepare a report consistent the scope of the project. All reports are completed electronically through use of word processing, spreadsheets, database software, as well as Internet resources. The equipment (laptop, desktop, chair) and environment (head office, remote, client location) will vary depending on the project and client being supported. As a result, the Senior Ergonomic Consultant is required to set up their computer workstation in the most ideal ergonomic manner based on available equipment provided. Due to the varying nature of project timelines, deliverables, and deadlines, the duration of sustained data analysis and report writing will vary. As the Senior Ergonomic Consultant has some control over their working postures within this task, the duration of sustained seated postures within a day is typically 60 minutes before a postural break is taken. Depending on the nature of the project and work day, the Senior Ergonomic Consultant may resume seated postures following postural breaks for the majority of their day.

Reach			
Vertical Reach - Range (cm)	Vertical Reach - Usual (cm)	Horizontal Reach - Range (cm)	Horizontal Reach - Usual (cm)
30 - 160 cm	75 - 140 cm	0 - maximum arm's reach	0 - 50 cm

Lifting Parameters			
Parameter	Measurement (cm)	Weight (kg)	Times/cycle
Horizontal Load Distance (distance of knuckles away from body)	Distance of comfort	Notebook: <1 kg Laptop Computer/Supplies: 4.5 kg	Variable Up to 4 times per shift
Vertical Load Distance (height of load at start of lift)	Notebooks, reference materials, Laptop Computer and accessories: varies from 30 - 90cm		
Vertical Lifting Distance (distance that the load is lifted through)	Variable but typically onto desk or working surface/laptop stand.		

Carrying Parameters			
Parameter	Measurement (cm,m)	Weight (kg)	Times/cycle
Vertical Position of Load	Height of comfort	Notebook: <1 kg	Variable as directly dependent on project/client being supported.
Horizontal Position of Load	Distance of comfort	Laptop Computer/ Supplies: 4.5 kg	
Distance Carried	Variable: Typically <1 to 1000 m	*May be required while climbing stairs into/out of working location	Senior Ergonomic Consultants have access to rolling bags to transport equipment instead of carrying it.

Pushing/Pulling Parameters			
Handle Height (cm)	Initial (kg)	Distance of Push (up to 2m, 2-7.5m, >7.5m)	Times/cycle
Roller bag: variable, 70 - 100 cm	Variable: < 5kg	Variable: Typically <1 to 1000 m	Variable: Up to 4 times per shift

Postures			
Upper Extremity		Lower Extremity	
Neck:	0 - 45 deg flex and rot'n	Torso:	0 - 90 deg flex, primarily when in seated postures
Shoulder:	0 - 120 deg flex and abduct	Hip/Knee/Ankle:	Used to sit, stand, and squat/crouch
Elbow:	0 - 180 deg flex/ext		
Wrist:	+/- 20 deg flex/ext/dev'n		
Finger Demands/Dexterity		General Demands	
Hand	Grip - Power and Pinch	Mobility	Sitting and Walking
Fingers	Handling and Fine Fingering	Other	Standing, crouching, squatting, and climbing stairs

## Physical Demands Summary

**Task #3:** Instructing and facilitating training sessions

**Details:** The Senior Ergonomic Consultant may be required to instruct and facilitate training sessions at various client locations. Depending on the client, this may only include setting up computer but could also include setting up the audio/visual equipment, as well as moving chairs and tables to create a positive training layout. Training sessions may be delivered at client locations in conference rooms, at hotel type locations, or via webinar format. Throughout instructing and facilitating the training session, the Senior Ergonomic Consultant may be required to provide demonstrations of tasks, ideal work methods and various postures. As a result, the postures and movements required will vary depending on the topic of training delivered. Depending on the type and duration of training session, the Senior Ergonomic Consultant may stand/walk for between 1 - 2 hours at a time while presenting material before a 15 minute break. For full day training sessions they would be required to stand for the duration of the session other than 15 min breaks and a lunch break.

Reach			
Vertical Reach - Range (cm)	Vertical Reach - Usual (cm)	Horizontal Reach - Range (cm)	Horizontal Reach - Usual (cm)
0 - 200 cm	75 - 185 cm	0 - maximum arm's reach	0 - 50 cm

Lifting Parameters			
Parameter	Measurement (cm)	Weight (kg)	Times/cycle
Horizontal Load Distance <i>(distance of knuckles away from body)</i>	Distance of comfort	Laptop computer, handouts, InFocus machine: Up to 6 kg	Variable Up to 4 times per shift
Vertical Load Distance <i>(height of load at start of lift)</i>	Notebooks, reference materials, Laptop Computer and accessories: varies from 30 - 90cm		
Vertical Lifting Distance <i>(distance that the load is lifted through)</i>	Variable but typically onto table or working surface/lecturn.		

Carrying Parameters			
Parameter	Measurement (cm,m)	Weight (kg)	Times/cycle
Vertical Position of Load	Height of comfort	Laptop Computer/ Supplies: Up to 6 kg  <i>*May be required while climbing stairs into/out of working location</i>	Variable Up to 4 times per shift  Senior Ergonomic Consultants have access to rolling bags to transport items instead of carrying them.
Horizontal Position of Load	Distance of comfort		
Distance Carried	Variable: Typically <1 to 1000 m		

Pushing/Pulling Parameters			
Handle Height (cm)	Initial (kg)	Distance of Push <i>(up to 2m, 2-7.5m, &gt;7.5m)</i>	Times/cycle
1. Doors (100 - 110 cm) 2. Overhead screen (up to 200 cm) 3. Rolling laptop / office bag (70 - 100 cm)	1. Doors: 3 to 5 kg 2. Overhead screen: 1 to 2 kg 3. Rolling bag: <5 kg	1. Doors: Minimal <1 m 2. Overhead screen: <1 m 3. Rolling bag: <1 to 1000 m	Variable Up to 4 times per shift

Postures			
Upper Extremity		Lower Extremity	
Neck:	0 - 45 deg flex, 0 - 30 deg ext, 0 - 45 degrees rotation	Torso:	0 - 90 deg flex, primarily when in seated postures
Shoulder:	0 - 180 deg flex, 0 - 180 deg abduct	Hip/Knee/Ankle:	Used to sit, stand, walk, climb and squat/crouch
Elbow:	0 - 180 deg flex/ext		
Wrist:	+/- 30 deg flex/ext/dev'n		
Finger Demands/Dexterity		General Demands	
Hand	Grip - Power and Pinch	Mobility	Standing and Walking
Fingers	Handling and Fine Fingering	Other	Sitting, crouching, squatting, and climbing stairs

## Physical Demands Summary

### Task #4:

Travelling between and to client locations

**Details:** Depending on the projects being supported, the Senior Ergonomic Consultant may be required to travel between client locations on the same day. Travelling between clients may require the Senior Ergonomic Consultant to load/unload their vehicle with equipment/supplies needed to support the data collection or training session. Travelling distances will vary depending on client support, up to 60 minute sustained sitting tolerances may be required.

Reach			
Vertical Reach - Range (cm)	Vertical Reach - Usual (cm)	Horizontal Reach - Range (cm)	Horizontal Reach - Usual (cm)
30 - 200 cm	85 - 105 cm	0 - 75 cm	0 - 55 cm

Lifting Parameters			
Parameter	Measurement (cm)	Weight (kg)	Times/cycle
Horizontal Load Distance (distance of knuckles away from body)	Up to 65 cm	Equipment/Supplies/Laptop/Personal bags: Up to 6 kg	Variable
Vertical Load Distance (height of load at start of lift)	Varies, typically from 30 - 90cm		
Vertical Lifting Distance (distance that the load is lifted through)	30 - 120 cm		

Carrying Parameters			
Parameter	Measurement (cm,m)	Weight (kg)	Times/cycle
Vertical Position of Load	Height of comfort	Equipment/Supplies/Laptop/Personal bags: Up to 6 kg	Variable Up to 4 times per shift  Senior Ergonomic Consultants have access to rolling bags to transport items instead of carrying them
Horizontal Position of Load	Distance of comfort		
Distance Carried	Variable: Typically <1 to 1000 m		

Pushing/Pulling Parameters			
Handle Height (cm)	Initial (kg)	Distance of Push (up to 2m, 2-7.5m, >7.5m)	Times/cycle
1. Open/close vehicle doors (80 - 110 cm)	1. 3 to 5 kg	1. Minimal, <1 m	Variable, up to 4 trips per shift.
2. Shifting gears (60 cm)	2. 1 to 2 kg	2. Minimal, <1 m	
3. Engaging parking brake (60 - 70 cm)	3. 1 to 2 kg	3. Minimal, <1 m	
4. Office/plant doors (100 - 110 cm)	4. 3 to 5 kg	4. Minimal, <1 m	
5. Rolling laptop / Office Bag (90 - 100 cm)	5. <5 kg	5. <1 to 1000 m	

Postures			
Upper Extremity		Lower Extremity	
Neck:	0 - 45 deg flex, 0 - 30 deg ext, 0 - 45 deg rot'n	Torso:	0 - 90 deg flex, primarily when in seated/driving postures
Shoulder:	0 - 180 deg flex, 0 - 180 deg abduct	Hip/Knee/Ankle:	Used to sit, stand, walk and operate pedals to drive vehicle
Elbow:	0 - 180 deg flex/ext		
Wrist:	+/- 30 deg flex/ext/dev'n		
Finger Demands/Dexterity		General Demands	
Hand	Grip - Power and Pinch	Mobility	Sitting
Fingers	Handling and Fine Fingering	Other	Climbing in/out of vehicle

## Summary of Additional Specific Requirements

Cognitive Demands	Required	Comments or Details
<b>Hearing</b>		
Conversation	X	With co-workers, management team and clients
Other Sounds	X	Announcements and alarms
<b>Vision</b>		
Near	X	Computer work, paperwork, and data collection
Far	X	Navigating throughout client locations and driving
Colour	X	Computer work and during data collection
<b>Perception</b>		
Spatial Form	X	Data collection
Feeling	X	Data collection
Reading	X	Computer work, paperwork, and driving
Writing	X	Data collection, paperwork and analysis
Speech	X	With co-workers, management team and clients

Environmental Demands	Required	Comments or Details
Air borne particles	X	May be exposed depending on client (i.e. health care, hospitals)
Noise	X	Hearing protection may be required depending on the client
Hazardous machines/tools	X	May be exposed depending on client
Radiant/thermal energy	X	May be exposed depending on client
Congested work site	X	May be exposed depending on client

Conditions of Work	Required	Comments or Details
Work alone	X	May support independent projects
Work Independently but in a team	X	May support independent projects, but works as a larger part of a consulting team
Deadline pressure	X	Required to meet client deadlines
Operate equipment/machinery	X	Tools required for data collection and analysis (i.e. camera, force gauge, scale, tape measure, computer)
Shift work	X	Typically day shift support, but afternoon or night support may be required depending on client requests

Personal Protective Equipment	Required	Comments or Details
Safety glasses	X	May be required depending on client
Hard hat	X	May be required depending on client
Jacket/sleeves/paint suit	X	May be required depending on client
Safety shoes	X	May be required depending on client
Hearing protection	X	May be required depending on client
Safety vest	X	May be required depending on client
Gloves	X	May be required depending on client
Face mask	X	May be required depending on client

**Psychological / Cognitive Job Demands Analysis**

Category	Area of Focus <i>Description / Definition</i>	Senior Ergonomic Consultant <i>Micro= 70% / Meso= 25% / Macro= 5%</i>
Self-Supervision	The ability to work effectively without supervision and demonstrate initiative. When required, they are expected to exercise good problem solving and judgement and also think beyond the assigned tasks to see opportunities.	Predominantly self-supervised with contact with the Supervising and/or Managing Ergonomist providing work direction as needed. Demonstrate initiative to think beyond assigned tasks on an ongoing basis.
Time Pressures	The extent to which work tasks are expected to be completed within a given time period or the extent to which a fast work pace is required because of the nature of the work or work volume.	Able to manage ongoing pressure to meet deadlines, work within time constraints, and/or support a high volume of work and fast pace of work. Able to complete tasks as directed within timelines.
Attention to Detail	The ability to support work tasks that require attention to or concentration on details of information. This demand implies that insufficient attention to detail will result in work errors and/or inefficiencies.	Intense attention to detail or concentration is required for majority of tasks. Able to apply <i>meso level</i> common sense/logic checks to <i>micro detail</i> .
Performance of multiple tasks	The ability to perform and/or monitor more than one task at a time and to be able to judge when tasks require attention. The ability to prioritize tasks and manage time effectively (juggle various tasks efficiently) is required.	Responsible for multiple concurrent tasks. Must exercise a high degree of time management skill and judgement required for successful ongoing establishment of priorities.
Exposure to distracting stimuli	The ability to perform work duties without distraction from visual, auditory or other sensory stimuli. May include verbal conversations of colleagues in an open office area, phones ringing, and movement of people.	Able to work within environments with moderate to high degree of distracting stimuli
Need to work co-operatively with others	The ability to work co-operatively with others. This may include team projects, shared job duties, interacting with Management, etc. This requires one to have good communication skills, good teamwork and interpersonal skills, be open minded, diplomatic or have good negotiation skills.	Able to work in close co-operation with others when required.  Able to support colleagues on a mentoring basis.
Exposure to emotional or confrontational situations	Exposure to situations in which a client or the public may be emotional or confrontational and the consultant is required to interact with the individual in order to complete a job requirement. These scenarios may be in person or over the telephone.	Occasional exposure to emotional or confrontational circumstances or individuals with whom the consultant must interact in order to complete job requirements.
Responsibility and accountability	The extent of liability or safety risk that could result if the consultant does not exercise appropriate judgement or attention, or follow policies, procedures, and processes during the performance of job tasks.	Errors in judgement or attention would result in liability or risks ranging from serious legal consequences, significant expense, or health and safety risks to clients, colleagues, or the company.
Reading literacy	The ability to read and comprehend English text and written documents.	A high degree of reading literacy is required to read reports, references, or other documents with a high degree of comprehension

**Psychological / Cognitive Job Demands Analysis**

Category	Area of Focus <i>Description / Definition</i>	Senior Ergonomic Consultant <i>Micro= 70% / Meso= 25% / Macro= 5%</i>
Written literacy	The ability to create English text within generally accepted grammar and spelling norms.	Able to create memos, reports, or any communications with accurate spelling, grammatical construction, professional format (pdf margins, titles, fonts, sizes of fonts), concise, clarity, and/or careful wording. Able to prepare reports to finished product quality with minimal leadership direction.
Data Analytics	The ability to process, analyze, and comprehend numerical information even if the calculation is performed electronically.	Able to create, understand, and explain complex arithmetic operations such as division, multiplication, percentages, ratios and begin to apply abstract mathematical formulae e.g., statistical comparisons, correlating data sets. Able to apply meso level common sense/logic checks to micro detail to verify product quality.
Computer literacy	The extent to which a job requires the ability to use computer technology	Able to use standard computer programs (e.g. Excel, WORD, Power Point, video conferencing) and smart phones (text, emails, Apps) at an advanced level and apply problem solving skills as required.
Verbal Communication	The ability to clearly comprehend and express ideas and information, through conversations and presentations across multiple mediums (ie. over the phone, in person, on camera).	Communication skills are required to comprehend and communicate complex information fluently within conversations and presentations e.g. explaining statistical analysis or risk assessment results to peers, OI Leadership, or clients.  Able to pivot to discuss/present information with little to no advanced notice.
Memory	The ability to retrieve and recall information on demand that has been previously learned.	Able to recall information that is applied to work tasks on a regular basis as well as recall information that harder to remember because it is recalled infrequently. Able to recall many pieces of detailed information, policies, procedures, and processes which may have to be recalled in demanding situations ie. due to deadlines,etc.
Resilience	The ability to recover quickly from difficulties; toughness, grit.	Able to demonstrate self awareness and communicate accordingly to ensure you are able to recover quickly from difficulties and demonstrate toughness and grit on an ongoing basis.
Decision Making	The ability to consider relevant details/criteria and come to a conclusion.	Able to confidently and independently review information, consider appropriate methodologies (OI, industry accepted standards, etc.), identify conclusions, and explain rationale used.  Able to apply meso level common sense/logic checks to micro detail to verify product quality and decision logic.



**Physical and Cognitive Demands Description**

**Company Name:** Options Incorporated  
**Company Address:** 22 Westmount Road, Guelph Ontario      **Date of Evaluation:** September 2021  
**Position Analyzed:** Supervising Ergonomist  
**Shift Operation:** - Typically: 8hrs/shift, but up to 44hrs/week  
- 5 days/week; typically Monday to Friday  
- Variable start times depending on client demands  
- One 30 minute lunch  
**Contact Person:** Kirsti MacAulay, CCPE  
Principal Ergonomist

A Supervising Ergonomist is a professional and supervisory position that includes providing direction and accepting responsibility for client deliverables and actions of all workers specifically regarding quality, costs and safety. This includes supporting clients, as well as, consultants to identify and assess ergonomic hazards in various workplaces (i.e. office settings, nuclear industries, health care, automotive, manufacturing, food, and municipalities etc) while producing technical reports in a proficient and timely manner. On an ongoing basis, this includes completing data collection, taking measurements and forces, analyzing data and interpreting results, followed by compiling detailed analysis/reports. Supervising Ergonomist may also be required to co-ordinate, prepare, instruct and/or facilitate training sessions, including setup of computer / visual audio equipment. Specific to client/project demands, Supervising Ergonomist will execute and monitor project plans within scope including co-ordinating and communicating ergonomic recommendations via written reports, oral presentations, and measurable/deliverables reports. They may be required to manage multiple projects simultaneously and adjust support levels and timelines to adhere to client and company deadlines.

Supervising Ergonomist are required to identify business development opportunities to improve and/or expand provided services to assemble solutions for clients. They may also participate in client management reviews to understand client business conditions, true problems, limiting factors, and controls. Due to the nature of consulting, Supervising Ergonomist are required to conduct themselves professionally at all times and effectively interact with diverse clientele. As supervisors, Supervising Ergonomist are required to conduct themselves in a manner that upholds safe, healthy, and inspired workplace environments consistent with all OI policies and procedures and corporate culture.

A Supervising Ergonomist is required to have a valid drivers' license as they will be required to support clients at varying locations, typically along the Highway 401 corridor. A professional in this position may be required to work in a close team environment (i.e. embedded client support) or independently depending on the project they are supporting. This may be required on either a physical (face to face) or virtual (remote) basis.

Due to the inherent dynamic nature of this position, the required physical demands are variable on a daily basis but will typically include at least three of the outlined essential tasks. However, within each week a professional in this position could be required to focus on a single task or all five of the essential tasks outlined within one day. The variability and flexibility will depend on the required client support, staff support, project deadlines, and specific scenario/environment.

Task Number	Essential Tasks
1	Collecting data and observing within various work environments
2	Completing data analysis and report writing
3	Executing and monitoring project plans/client expectations ensuring scope and deliverables are met
4	Instructing and facilitating training sessions
5	Travelling between and to client locations

## Physical Demands Analysis: Summary

**Position Analyzed:** Supervising Ergonomist

**Date of evaluation:** September 2021

The below chart is a summary of the overall physical demands required by a professional in this position. Details on each of these parameters are presented in the remainder of the document.

Parameter	Requirements				
	Not Required	Seldom (1-5%)	Occasional (6-33%)	Frequent (34-66%)	Constant (67-100%)
Stand			X	→	X
Walk		X	→	X	
Sit			X	→	X
Stoop/Bend		X			
Twist		X			
Kneel/Crouch		X			
Lift		X	→	X	
Carry		X	→	X	
Push/Pull		X	→	X	
Handling/Power Grip			X	X	
Fingering/Pinch Grip			X	→	X
<b>Vertical Reach</b>					
Below Knuckle			X		
Knuckle to Shoulder					X
Above Shoulder			X		
<b>Horizontal Reach</b>					
Beyond functional reach (45cm)			X		

## Physical Demands Summary

**Task #1:** Collecting data and observing within various work environments

**Details:** Depending on the project being supported, Supervising Ergonomists could be required to complete data collection at single or various client locations. Collecting data may include, but is not limited to, taking photographs and videos, measuring vertical and horizontal reaches with a tape measure, and taking various force measurements using a force gauge or weights using a scale. Supervising Ergonomists are required to take a hands on approach within the workplaces being observed. As a result, to obtain these measurements and collect this data they will reach to required areas, lift/weigh required objects, push/pull dollies, carts, hoists, lift assists, parts, or other equipment to capture forces. While collecting data, Supervising Ergonomists must be cautious not to overexert and/or avoid repetition in order to minimize exposure to awkward postures and/or unusual/high forces. It is deemed sufficient to simply categorize such instances as "high forces" or "forces exceed recommended guidelines". Supervising Ergonomists may also be required to adjust existing equipment (chairs, keyboard trays, etc.) to support ideal results. Supervising Ergonomists will complete all data collection while wearing any client/environment specific Personal Protective Equipment. Due to the varying nature of projects, postures and mobility demands will vary depending on the project supported. The duration of data collection within a day typically ranges from 60 minutes to 4 hours prolonged standing, with periods of intermittent walking around the work area.

Reach			
Vertical Reach - Range (cm)	Vertical Reach - Usual (cm)	Horizontal Reach - Range (cm)	Horizontal Reach - Usual (cm)
0 - 200 cm	30 - 185 cm	0 - 100 cm	0 - 70 cm

Lifting Parameters			
Parameter	Measurement (cm)	Weight (kg)	Frequency
Horizontal Load Distance <i>(distance of knuckles away from body)</i>	Variable, but typically at distance of comfort	Notebook: <1 kg	Variable as directly dependent on project being supported.  Supervising Ergonomists must consider client requests and structure their data collection to avoid repetitive exposure to lifting demands.
Vertical Load Distance <i>(height of load at start of lift)</i>	Notebook, Measurement Tools: typically between 0 - 90 cm  Objects being measured: Variable depending on object and specific task demands/environment	Measurement Tools: force gauges, tape measure, cameras: Up to 4.5 kg  Objects being measured: variable with potential to lift loads up to 30 kg provided safe lifting is feasible. Otherwise, forces above 21kg will be logged as "high forces" or "forces exceed recommended guidelines"	
Vertical Lifting Distance <i>(distance that the load is lifted through)</i>	Height of comfort (typically between waist and chest)		

Carrying Parameters			
Parameter	Measurement (cm,m)	Weight (kg)	Frequency
Vertical Position of Load	Height of comfort (typically between waist and chest)	Notebook: <1 kg  Measurement Tools: force gauges, tape measure, cameras: Up to 4.5 kg	Variable as directly dependent on project being supported.  Supervising Ergonomists have access to rolling bags to transport equipment instead of carrying it.
Horizontal Position of Load	Distance of comfort		
Distance Carried	Variable: typically <1 to 500 m but could be around client facility.		

Pushing/Pulling Parameters			
Hand Height (cm)	Initial (kg)	Distance of Push <i>(up to 2m, 2-7.5m, &gt;7.5m)</i>	Frequency
1. Office/plant doors: 100-110 cm  2. Objects measured: Various heights (parts/equipment/dollies) depending on project demands	Doors: 1. 3 to 5 kg  Objects measured: variable with potential to push/pull loads up to 41 kg provided safe pushing/ pulling is feasible. Otherwise, forces above 27kg will be logged as "high forces" or "forces exceed recommended guidelines"	1. Doors: Minimal <1 m  2. Objects measured: Variable	1. Doors: As needed  2. Objects measured: Variable, Supervising Ergonomists must consider client requests and structure their data collection to avoid repetitive exposure to pushing/pulling demands.

Postures			
Upper Extremity		Lower Extremity	
Neck:	0 - 45 deg flex, 90 deg rot'n, 20 deg ext	Torso:	0 - 90 deg flex
Shoulder:	0 - 180 deg flex, 0 - 180 deg abduct, 20 deg ext	Hip/Knee/Ankle:	Used to sit, stand, walk, crouch, climb and/or squat
Elbow:	0 - 180 deg flex/ext		
Wrist:	+/- 30 deg flex/ext/dev'n		
Finger Demands/Dexterity		General Demands	
Hand	Grip - Power and Pinch	Mobility	Walk
Fingers	Handling and Fine Fingering	Other	Kneeling and Climbing stairs

## Physical Demands Summary

**Task #2:** Completing data analysis and report writing

**Details:** Following collection of data, Supervising Ergonomists are responsible for analyzing and/or collating the information. Once the analysis is completed, they will prepare a report consistent the scope of the project. All reports are completed electronically through use of word processing, spreadsheets, database software, as well as Internet resources. The equipment (laptop, desktop, chair) and environment (head office, remote, client location) will vary depending on the project and client being supported. As a result, Supervising Ergonomists are required to set up their computer workstation in the most ideal ergonomic manner based on available equipment provided. Due to the varying nature of project timelines, deliverables, and deadlines, the duration of sustained data analysis and report writing will vary. As the Supervising Ergonomist has some control over their working postures within this task, the duration of sustained seated postures within a day is typically 60 minutes before a postural break is taken. Depending on the nature of the project and work day, Supervising Ergonomists may resume seated postures following postural breaks for the majority of their day.

<b>Reach</b>			
<i>Vertical Reach - Range (cm)</i>	<i>Vertical Reach - Usual (cm)</i>	<i>Horizontal Reach - Range (cm)</i>	<i>Horizontal Reach - Usual (cm)</i>
30 - 160 cm	75 - 140 cm	0 - maximum arm's reach	0 - 50 cm

<b>Lifting Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Horizontal Load Distance</i> <i>(distance of knuckles away from body)</i>	Distance of comfort	Notebook: <1 kg  Laptop Computer/Supplies: 4.5 kg	Variable: Up to 4 times per shift
<i>Vertical Load Distance</i> <i>(height of load at start of lift)</i>	Notebooks, reference materials, Laptop Computer and accessories: varies from 30 - 90cm		
<i>Vertical Lifting Distance</i> <i>(distance that the load is lifted through)</i>	Variable but typically onto desk or working surface/laptop stand.		

<b>Carrying Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm,m)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Vertical Position of Load</i>	Height of comfort	Notebook: <1 kg	Variable as directly dependent on project/client being supported.  Supervising Ergonomists have access to rolling bags to transport equipment instead of carrying it.
<i>Horizontal Position of Load</i>	Distance of comfort	Laptop Computer/ Supplies: 4.5 kg	
<i>Distance Carried</i>	Variable: Typically <1 to 1000 m	<i>*May be required while climbing stairs into/out of working location</i>	

<b>Pushing/Pulling Parameters</b>			
<i>Hand Height (cm)</i>	<i>Initial (kg)</i>	<i>Distance of Push</i> <i>(up to 2m, 2-7.5m, &gt;7.5m)</i>	<i>Frequency</i>
Roller bag: variable, 70 - 100 cm	Variable: < 5kg	Variable: Typically <1 to 1000 m	Variable: Up to 4 times per shift

<b>Postures</b>			
<i>Upper Extremity</i>		<i>Lower Extremity</i>	
<i>Neck:</i>	0 - 45 deg flex and rot'n	<i>Torso:</i>	0 - 90 deg flex, primarily when in seated postures
<i>Shoulder:</i>	0 - 120 deg flex, 0 - 120 deg abduct	<i>Hip/Knee/Ankle:</i>	Used to sit, stand, and squat/crouch
<i>Elbow:</i>	0 - 180 deg flex/ext		
<i>Wrist:</i>	+/- 20 deg flex/ext/dev'n		
<i>Finger Demands/Dexterity</i>		<i>General Demands</i>	
<i>Hand</i>	Grip - Power and Pinch	<i>Mobility</i>	Sitting and walking
<i>Fingers</i>	Handing and Fine finger movements	<i>Other</i>	Standing, crouching, squatting, and climbing stairs

## Physical Demands Summary

**Task #3:** Executing and monitoring project plans/client expectations ensuring scope and deliverables are met

**Details:** Following guidance from management, a Supervising Ergonomist provides the required levels of support to execute and monitor overall progress to project plans and client expectations. Working closely with consultants provides Supervising Ergonomists with unique and early insight into potential project bottlenecks or areas of concern. Identifying these, and working to address them through one on one interactions, as well as discussions with management is required to ensure project scope is maintained and client deliverables are achieved. This task is primarily cognitive, occurring during and throughout all other tasks. However, since focussed activity around this task will be completed during desk based tasks, related physical demands to this environment have been presented below.

<b>Reach</b>			
<i>Vertical Reach - Range (cm)</i>	<i>Vertical Reach - Usual (cm)</i>	<i>Horizontal Reach - Range (cm)</i>	<i>Horizontal Reach - Usual (cm)</i>
30 - 160 cm	75 - 140 cm	0 - maximum arm's reach	0 - 50 cm

<b>Lifting Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Horizontal Load Distance (distance of knuckles away from body)</i>	Distance of comfort	Notebook: <1 kg Laptop Computer/Supplies: 4.5 kg	Variable: Up to 4 times per shift
<i>Vertical Load Distance (height of load at start of lift)</i>	Notebooks, reference materials, Laptop Computer and accessories: varies from 30 - 90cm		
<i>Vertical Lifting Distance (distance that the load is lifted through)</i>	Variable but typically onto desk or working surface/laptop stand.		

<b>Carrying Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm,m)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Vertical Position of Load</i>	Height of comfort	Notebook: <1 kg	Variable as directly dependent on project/client being supported.
<i>Horizontal Position of Load</i>	Distance of comfort	Laptop Computer/ Supplies: 4.5 kg	
<i>Distance Carried</i>	Variable: Typically <1 to 1000 m	*May be required while climbing stairs into/out of working location	

<b>Pushing/Pulling Parameters</b>			
<i>Hand Height (cm)</i>	<i>Initial (kg)</i>	<i>Distance of Push (up to 2m, 2-7.5m, &gt;7.5m)</i>	<i>Frequency</i>
Roller bag: variable, 70 - 100 cm	Variable: < 5kg	Variable: Typically <1 to 1000 m	Variable: Up to 4 times per shift

<b>Postures</b>			
<i>Upper Extremity</i>		<i>Lower Extremity</i>	
<i>Neck:</i>	0 - 45 deg flex and rot'n	<i>Torso:</i>	0 - 90 deg flex, primarily when in seated postures
<i>Shoulder:</i>	0 - 120 deg flex, 0 - 120 deg abduct	<i>Hip/Knee/Ankle:</i>	Used to sit, stand, and squat/crouch
<i>Elbow:</i>	0 - 180 deg flex/ext		
<i>Wrist:</i>	+/- 20 deg flex/ext/dev'n		
<i>Finger Demands/Dexterity</i>		<i>General Demands</i>	
<i>Hand</i>	Grip - Power and Pinch	<i>Mobility</i>	Sitting and walking
<i>Fingers</i>	Handing and Fine finger movements	<i>Other</i>	Standing, crouching, squatting, and climbing stairs

## Physical Demands Summary

**Task #4:** Instructing and facilitating training sessions

**Details:** Supervising Ergonomists may be required to instruct and facilitate training sessions at various client locations. Depending on the client, this may only include setting up computer but could also include setting up the audio/visual equipment, as well as moving chairs and tables to create a positive training layout. Training sessions may be delivered at client locations in conference rooms, at hotel type locations, or via webinar format. Throughout instructing and facilitating the training session, a Supervising Ergonomist may be required to provide demonstrations of tasks, ideal work methods, and various postures. As a result, the postures and movements required will vary depending on the topic of training delivered. Depending on the type and duration of training session, a Supervising Ergonomist may stand/walk for between 1 - 2 hours at a time while presenting material before a 15 minute break. For full day training sessions they would be required to stand for the duration of the session other than 15 min breaks and a lunch break.

<b>Reach</b>			
<i>Vertical Reach - Range (cm)</i>	<i>Vertical Reach - Usual (cm)</i>	<i>Horizontal Reach - Range (cm)</i>	<i>Horizontal Reach - Usual (cm)</i>
0 - 200 cm	75 - 185 cm	0 - maximum arm's reach	0 - 50 cm

<b>Lifting Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Horizontal Load Distance</i> <i>(distance of knuckles away from body)</i>	Distance of comfort	Laptop computer, handouts, In-Focus machine: Up to 6 kg	Variable Up to 4 times per shift
<i>Vertical Load Distance</i> <i>(height of load at start of lift)</i>	Notebooks, reference materials, Laptop Computer and accessories: varies from 30 - 90cm		
<i>Vertical Lifting Distance</i> <i>(distance that the load is lifted through)</i>	Variable but typically onto table or working surface/lecturn.		

<b>Carrying Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm,m)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Vertical Position of Load</i>	Height of comfort	Laptop Computer/ Supplies: Up to 6 kg	Variable Up to 4 times per shift
<i>Horizontal Position of Load</i>	Distance of comfort		
<i>Distance Carried</i>	Variable: Typically <1 to 1000 m	*May be required while climbing stairs into/out of working location	Supervising Ergonomists have access to rolling bags to transport items instead of carrying them.

<b>Pushing/Pulling Parameters</b>			
<i>Hand Height (cm)</i>	<i>Initial (kg)</i>	<i>Distance of Push</i> <i>(up to 2m, 2-7.5m, &gt;7.5m)</i>	<i>Frequency</i>
1. Doors (100 - 110 cm) 2. Overhead screen (up to 200 cm) 3. Rolling laptop / office bag (70 - 100 cm)	1. Doors: 3 to 5 kg 2. Overhead screen: 1 to 2 kg 3. Rolling bag: <5 kg	1. Doors: Minimal <1 m 2. Overhead screen: <1 m 3. Rolling bag: <1 to 1000 m	Variable Up to 4 times per shift

<b>Postures</b>			
<i>Upper Extremity</i>		<i>Lower Extremity</i>	
<i>Neck:</i>	0 - 45 deg flex, 0 - 30 deg ext, 0 - 45 deg rot'n	<i>Torso:</i>	0 - 90 deg flex, primarily when in seated postures
<i>Shoulder:</i>	0 - 180 deg flex, 0 - 180 deg abduct	<i>Hip/Knee/Ankle:</i>	Used to sit, stand, walk, climb and squat/crouch
<i>Elbow:</i>	0 - 180 deg flex/ext		
<i>Wrist:</i>	+/- 30 deg flex/ext/dev'n		
<i>Finger Demands/Dexterity</i>		<i>General Demands</i>	
<i>Hand</i>	Grip - Pinch and Power	<i>Mobility</i>	Stand and walk
<i>Fingers</i>	Handling and Fine finger movements	<i>Other</i>	Sitting, crouching, squatting, and climbing stairs

## Physical Demands Summary

**Task #5:** Travelling between and to client locations

**Details:** Depending on the projects being supported, Supervising Ergonomists may be required to travel between client locations on the same day. Travelling between clients may require Supervising Ergonomists to load/unload their vehicle with equipment/supplies needed to support the data collection or training session. Travelling distances will vary depending on client support, up to 60 minute sustained sitting tolerances may be required.

<b>Reach</b>			
<i>Vertical Reach - Range (cm)</i>	<i>Vertical Reach - Usual (cm)</i>	<i>Horizontal Reach - Range (cm)</i>	<i>Horizontal Reach - Usual (cm)</i>
30 - 200 cm	85 - 105 cm	0 - 75 cm	0 - 55 cm

<b>Lifting Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Horizontal Load Distance</i> <i>(distance of knuckles away from body)</i>	Up to 65 cm	Equipment/Supplies/Laptop/ Personal bags: Up to 6 kg	Variable
<i>Vertical Load Distance</i> <i>(height of load at start of lift)</i>	Varies, typically from 30 - 90cm		
<i>Vertical Lifting Distance</i> <i>(distance that the load is lifted through)</i>	30 - 120 cm		

<b>Carrying Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm,m)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Vertical Position of Load</i>	Height of comfort	Equipment/Supplies/Laptop/ Personal bags: Up to 6 kg	Variable Up to 4 times per shift
<i>Horizontal Position of Load</i>	Distance of comfort		Supervising Ergonomists have access to rolling bags to transport items instead of carrying them.
<i>Distance Carried</i>	Variable: Typically <1 to 1000 m		

<b>Pushing/Pulling Parameters</b>			
<i>Hand Height (cm)</i>	<i>Initial (kg)</i>	<i>Distance of Push</i> <i>(up to 2m, 2-7.5m, &gt;7.5m)</i>	<i>Frequency</i>
1. Open/close vehicle doors (80 - 110 cm) 2. Shifting gears (60 cm) 3. Engaging parking brake (60 - 70 cm) 4. Office/plant doors (100 - 110 cm) 5. Rolling laptop / Office Bag (90 - 100 cm)	1. 3 to 5 kg 2. 1 to 2 kg 3. 1 to 2 kg 4. 3 to 5 kg 5. <5 kg	1. Minimal, <1 m 2. Minimal, <1 m 3. Minimal, <1 m 4. Minimal, <1 m 5. <1 to 1000 m	Variable, up to 4 trips per shift.

<b>Postures</b>			
<i>Upper Extremity</i>		<i>Lower Extremity</i>	
<i>Neck:</i>	0 - 45 deg flex, 0 - 30 deg ext, 0 - 45 deg rot'n	<i>Torso:</i>	0 - 90 deg flex, primarily when in seated/driving postures
<i>Shoulder:</i>	0 - 180 deg flex, 0 - 180 deg abduct	<i>Hip/Knee/Ankle:</i>	Used to sit, stand, walk and operate pedals to drive vehicle
<i>Elbow:</i>	0 - 180 deg flex/ext		
<i>Wrist:</i>	+/- 30 deg flex/ext/dev'n		
<i>Finger Demands/Dexterity</i>		<i>General Demands</i>	
<i>Hand</i>	Grip - Power and Pinch	<i>Mobility</i>	Sitting
<i>Fingers</i>	Handling and Fine fingering	<i>Other</i>	Climbing in/out of vehicle

**Summary of Additional Specific Requirements**

<b>Cognitive Demands</b>	<b>Required</b>	<b>Comments or Details</b>
<b>Hearing</b>		
Conversation	X	With co-workers, management team and clients
Other Sounds	X	Announcements and alarms
<b>Vision</b>		
Near	X	Computer work, paperwork, and data collection
Far	X	Navigating throughout client locations and driving
Colour	X	Computer work and during data collection
<b>Perception</b>		
Spatial Form	X	Data collection
Feeling	X	Data collection
Reading	X	Computer work, paperwork, and driving
Writing	X	Data collection, paperwork and analysis
Speech	X	With co-workers, management team and clients

<b>Environmental Demands</b>	<b>Required</b>	<b>Comments or Details</b>
Air borne particles	X	May be exposed depending on client (i.e. health care, hospitals)
Noise	X	Hearing protection may be required depending on the client
Hazardous machines/tools	X	May be exposed depending on client
Radiant/thermal energy	X	May be exposed depending on client
Congested work site	X	May be exposed depending on client

<b>Conditions of Work</b>	<b>Required</b>	<b>Comments or Details</b>
Work alone	X	May support independent projects
Work Independently but in a team	X	May support independent projects, but works as a larger part of a consulting team
Deadline pressure	X	Required to meet client deadlines
Operate equipment/machinery	X	Tools required for data collection and analysis (i.e. camera, force gauge, scale, tape measure, computer)
Shift work	X	Typically day shift support, but afternoon or night support may be required depending on client requests

<b>Personal Protective Equipment</b>	<b>Required</b>	<b>Comments or Details</b>
Safety glasses	X	May be required depending on client
Hard hat	X	May be required depending on client
Jacket/sleeves/paint suit	X	May be required depending on client
Safety shoes	X	May be required depending on client
Hearing protection	X	May be required depending on client
Safety vest	X	May be required depending on client
Gloves	X	May be required depending on client
Face mask	X	May be required depending on client



**Psychological / Cognitive Job Demands Analysis**

Category	Area of Focus <i>Description / Definition</i>	Supervising Ergonomist <i>Micro= 50% / Meso= 40% / Macro= 10%</i>
Self-Supervision	The ability to work effectively without supervision and demonstrate initiative. When required, they are expected to exercise good problem solving and judgement and also think beyond the assigned tasks to see opportunities.	Predominantly self-supervised with contact with Management to verify work direction as needed. Demonstrate initiative within all aspects of scope of work on an ongoing basis.
Supervision and Motivation	The ability to provide work direction to other consultants. Provide mentoring/coaching in a motivating and encouraging manner.	Provide mentoring and are responsible for Safety, Costs, and Quality associated with the projects and staff they are supervising. Able to mentor staff and positively motivate and encourage them towards achieving required goals.  CCCPE: Responsible for maintaining professional accountability for all work which they assign including assessments and documentation. Includes evaluating the knowledge, experience, skill, and judgment of the personnel being supervised to ensure they are competent to perform any activity that is assigned to them.
Time Pressures	The extent to which work tasks are expected to be completed within a given time period or the extent to which a fast work pace is required because of the nature of the work or work volume.	Able to manage ongoing pressure to meet deadlines, work within time constraints, and/or support a high volume of work and fast pace of work. Able to complete tasks, and ensure supervised staff complete tasks, within the required timelines. May be required to extend work day to support unique scenarios.
Attention to Detail	The ability to support work tasks that require attention to or concentration on details of information. This demand implies that insufficient attention to detail will result in work errors and/or inefficiencies.	Intense attention to detail or concentration is required for the majority of tasks. Able to apply meso level common sense/logic checks to micro detail on individual as well as supervised projects.
Performance of multiple tasks	The ability to perform and/or monitor more than one task at a time and to be able to judge when tasks require attention. The ability to prioritize tasks and manage time effectively (juggle various tasks efficiently) is required.	Constantly responsible for multiple concurrent tasks. Must exercise a high degree of time management skill and judgement for successful ongoing establishment of priorities and mentoring staff.
Exposure to distracting stimuli	The ability to perform work duties without distraction from visual, auditory or other sensory stimuli. May include verbal conversations of colleagues in an open office area, phones ringing, and movement of people.	Able to work within environments with high degree of distracting stimuli
Need to work co-operatively with others	The ability to work co-operatively with others. This may include team projects, shared job duties, interacting with Management, etc. This requires one to have good communication skills, good teamwork and interpersonal skills, be open minded, diplomatic or have good negotiation skills.	Able to work in close co-operation with others and support team dynamics on a constant basis.  Able to support colleagues on a mentoring basis.

**Psychological / Cognitive Job Demands Analysis**

Category	Area of Focus <i>Description / Definition</i>	Supervising Ergonomist <i>Micro= 50% / Meso= 40% / Macro= 10%</i>
Exposure to emotional or confrontational situations	Exposure to situations in which a client or the public may be emotional or confrontational and the consultant is required to interact with the individual in order to complete a job requirement. These scenarios may be in person or over the telephone.	Frequent exposure to emotional or confrontational circumstances or individuals with whom the consultant must interact in order to complete job requirements.
Responsibility and accountability	The extent of liability or safety risk that could result if the consultant does not exercise appropriate judgement or attention, or follow policies, procedures, and processes during the performance of job tasks.	Errors in judgement or attention would result in liability or risks ranging from serious legal consequences, significant expense, or health and safety risks to clients, colleagues, or the company.
Reading literacy	The ability to read and comprehend English text and written documents.	A high degree of reading literacy is required to read reports, references, policies (OI and client), or other documents with a high degree of comprehension.
Written literacy	The ability to create English text within generally accepted grammar and spelling norms.	Able to create memos, reports, or any communications with accurate spelling, grammatical construction, professional format (pdf margins, titles, fonts, sizes of fonts), concise, clarity, and/or careful wording. Able to edit and polish reports to finished product quality and provide written feedback/corrections.
Data Analytics	The ability to process, analyze, and comprehend numerical information even if the calculation is performed electronically.	Able to create, understand, and explain complex arithmetic operations such as division, multiplication, percentages, ratios and begin to apply abstract mathematical formulae e.g., statistical comparisons, co-relating data sets. Able to apply meso level common sense/logic checks to micro detail to verify product quality.
Computer literacy	The extent to which a job requires the ability to use computer technology	Able to use standard computer programs (e.g. Excel, WORD, Power Point, video conferencing) and smart phones (text, emails, Apps) at an advanced level and apply problem solving skills as required.
Verbal Communication	The ability to clearly comprehend and express ideas and information, through conversations and presentations across multiple mediums (ie. over the phone, in person, on camera).	Communication skills are required to comprehend and communicate complex information fluently and or communicate effectively in complex conversations and presentations e.g. explaining the design of a project, statistical analysis, risk assessment results, etc.  Able to pivot to take advantage of unique opportunities with little to no advanced notice.
Memory	The ability to retrieve and recall information on demand that has been previously learned.	Able to recall information that is applied to work tasks on a regular basis as well as recall information that harder to remember because it is recalled infrequently. Able to recall many pieces of detailed information, policies, procedures, and processes which may have to be recalled in demanding situations ie. due to deadlines, within unplanned situations, etc.
Resilience	The ability to recover quickly from difficulties; toughness, grit.	Able to demonstrate self awareness and communicate accordingly to ensure you are able to recover quickly from difficulties and demonstrate toughness and grit on an ongoing basis.
Decision Making	The ability to consider relevant details/criteria and come to a conclusion.	Able to confidently and independently review information, consider appropriate and new methodologies (OI, industry accepted standards, etc.), identify conclusions, and explain rationale used.  Able to apply meso level common sense/logic checks to micro detail to verify product quality and decision logic.

### Physical and Cognitive Demands Description

**Company Name:** Options Incorporated

**Company Address:** 22 Westmount Road, Guelph Ontario      **Date of Evaluation:** September 2021

**Position Analyzed:** Managing Ergonomist

**Shift Operation:**

- Typically: 8hrs/shift, but up to 44hrs/week
- 5 days/week; typically Monday to Friday
- Variable start times depending on client demands
- One 30 minute lunch

**Contact Person:** Kirsti MacAulay, CCPE  
Principal Ergonomist

A Managing Ergonomist is a professional, supervisory, and management position that includes providing direction and accepting responsibility for client support and actions of all workers specifically regarding quality, costs, safety, staffing, finance, and policy. This may include supporting clients, as well as, consultants to support client requests and needs in various workplaces (i.e. office settings, nuclear industries, health care, automotive, manufacturing, food, and municipalities etc) while producing required deliverables in a proficient and timely manner. Specific to company, client, and project demands, a Managing Ergonomist is required to monitor staff progress to ensure it remains within scope and meets outlined goals. They are required to manage multiple projects simultaneously and adjust support levels and timelines to adhere to client and company deadlines. On an occasional basis, they could be required to complete data collection, take measurements and forces, analyze data and interpret results, followed by compiling detailed analysis/reports. A Managing Ergonomist may also be required to co-ordinate, prepare, instruct and/or facilitate training sessions, including setup of computer / visual audio equipment.

Managing Ergonomists are required to identify business development opportunities to improve and/or expand provided services to assemble solutions for clients. They will actively participate in client management reviews to understand and influence company and client business conditions, true problems, limiting factors, and controls. Due to the nature of consulting, Managing Ergonomists are required to conduct themselves professionally at all times and effectively interact with diverse clientele. As managers, Managing Ergonomists are required to conduct themselves in a manner that upholds safe, healthy, and inspired workplace environments consistent with all OI policies and procedures and corporate culture.

A Managing Ergonomist is required to have a valid drivers' license as they will be required to support clients at varying locations, typically along the Highway 401 corridor. A professional in this position is required to work in a close team environment (i.e. embedded client support) as well as independently. This will require support within both physical (face to face) and virtual (remote) environments.

Due to the inherent dynamic nature of this position, the required physical demands are variable on a daily basis but will typically include at least three of the outlined essential tasks. However, within each week a professional in this position could be required to focus on a single task or all five of the essential tasks outlined within one day. The variability and flexibility will depend on the required client support, staff support, project deadlines, and specific scenario/environment.

Task Number	Essential Tasks
1	Collecting data and observing within various work environments
2	Completing data analysis and report writing
3	Supporting development of client and business opportunities while managing existing project plans/client expectations.
4	Instructing and facilitating training sessions
5	Travelling between and to client locations

## Physical Demands Analysis: Summary

**Position Analyzed:** Managing Ergonomist

**Date of evaluation:** September 2021

The below chart is a summary of the overall physical demands required by a professional in this position. Details on each of these parameters are presented in the remainder of the document.

Parameter	Requirements				
	Not Required	Seldom (1-5%)	Occasional (6-33%)	Frequent (34-66%)	Constant (67-100%)
Stand			X	—————→	
Walk		X	—————→		
Sit			X	—————→	
Stoop/Bend		X			
Twist		X			
Kneel/Crouch		X			
Lift		X	—————→		
Carry		X	—————→		
Push/Pull		X	—————→		
Handling/Power Grip			X	X	
Fingering/Pinch Grip			X	—————→	
<b>Vertical Reach</b>					
Below Knuckle			X		
Knuckle to Shoulder					X
Above Shoulder			X		
<b>Horizontal Reach</b>					
Beyond functional reach (45cm)			X		

## Physical Demands Summary

### Task #1:

Collecting data and observing within various work environments

**Details:** Depending on the project being supported, Managing Ergonomists could be required to complete data collection at single or various client locations. Collecting data may include, but is not limited to, taking photographs and videos, measuring vertical and horizontal reaches with a tape measure, and taking various force measurements using a force gauge or weights using a scale. Managing Ergonomists are required to take a hands on approach within the workplaces being observed. As a result, to obtain these measurements and collect this data they will reach to required areas, lift/weigh required objects, push/pull dollies, carts, hoists, lift assists, parts, or other equipment to capture forces. While collecting data, Managing Ergonomists must be cautious not to overexert and/or avoid repetition in order to minimize exposure to awkward postures and/or unusual/high forces. It is deemed sufficient to simply categorize such instances as “high forces” or “forces exceed recommended guidelines”. Supervisory Ergonomists may also be required to adjust existing equipment (chairs, keyboard trays, etc.) to support ideal results. Managing Ergonomists will complete all data collection while wearing any client/environment specific Personal Protective Equipment. Due to the varying nature of projects, postures and mobility demands will vary depending on the project supported. The duration of data collection within a day typically ranges from 60 minutes to 4 hours prolonged standing, with periods of intermittent walking around the work area.

Reach			
Vertical Reach - Range (cm)	Vertical Reach - Usual (cm)	Horizontal Reach - Range (cm)	Horizontal Reach - Usual (cm)
0 - 200 cm	30 - 185 cm	0 - 100 cm	0 - 70 cm

Lifting Parameters			
Parameter	Measurement (cm)	Weight (kg)	Frequency
Horizontal Load Distance <i>(distance of knuckles away from body)</i>	Variable, but typically at distance of comfort	Notebook: <1 kg	Variable as directly dependent on project being supported.  Managing Ergonomists must consider client requests and structure their data collection to avoid repetitive exposure to lifting demands.
Vertical Load Distance <i>(height of load at start of lift)</i>	Notebook, Measurement Tools: typically between 0 - 90 cm  Objects being measured: Variable depending on object and specific task demands/environment	Measurement Tools: force gauges, tape measure, cameras: Up to 4.5 kg  Objects being measured: variable with potential to lift loads up to 30 kg provided safe lifting is feasible. Otherwise, forces above 21kg will be logged as “high forces” or “forces exceed recommended guidelines”	
Vertical Lifting Distance <i>(distance that the load is lifted through)</i>	Height of comfort (typically between waist and chest)		

Carrying Parameters			
Parameter	Measurement (cm,m)	Weight (kg)	Frequency
Vertical Position of Load	Height of comfort (typically between waist and chest)	Notebook: <1 kg	Variable as directly dependent on project being supported.
Horizontal Position of Load	Distance of comfort	Measurement Tools: force gauges, tape measure, cameras: Up to 4.5 kg	
Distance Carried	Variable: typically <1 to 500 m but could be around client facility.		

Pushing/Pulling Parameters			
Hand Height (cm)	Initial (kg)	Distance of Push <i>(up to 2m, 2-7.5m, &gt;7.5m)</i>	Frequency
1. Office/plant doors: 100-110 cm  2. Objects measured: Various heights (parts/equipment/dollies) depending on project demands	Doors: 1. 3 to 5 kg  Objects measured: variable with potential to push/pull loads up to 41 kg provided safe pushing/ pulling is feasible. Otherwise, forces above 27kg will be logged as “high forces” or “forces exceed recommended guidelines”	1. Doors: Minimal <1 m  2. Objects measured: Variable	1. Doors: As needed  2. Objects measured: Variable, Managing Ergonomists must consider client requests and structure their data collection to avoid repetitive exposure to pushing/pulling demands.

Postures			
Upper Extremity		Lower Extremity	
Neck:	0 - 45 deg flex, 90 deg rot'n, 20 deg ext	Torso:	0 - 90 deg flex
Shoulder:	0 - 180 deg flex, 0 - 180 deg abduct, 20 deg ext	Hip/Knee/Ankle:	Used to sit, stand, walk, crouch, climb and/or squat
Elbow:	0 - 180 deg flex/ext		
Wrist:	+/- 30 deg flex/ext/dev'n		
Finger Demands/Dexterity		General Demands	
Hand	Grip - Power and Pinch	Mobility	Walk
Fingers	Handling and Fine Fingering	Other	Kneeling and Climbing stairs

## Physical Demands Summary

**Task #2:** Completing data analysis and report writing

**Details:** Following collection of data, Managing Ergonomists are responsible for analyzing and/or collating the information. Once the analysis is completed, they will prepare a report consistent the scope of the project. All reports are completed electronically through use of word processing, spreadsheets, database software, as well as Internet resources. The equipment (laptop, desktop, chair) and environment (head office, remote, client location) will vary depending on the project and client being supported. As a result, Managing Ergonomists are required to set up their computer workstation in the most ideal ergonomic manner based on available equipment provided. Due to the varying nature of project timelines, deliverables, and deadlines, the duration of sustained data analysis and report writing will vary. As the Managing Ergonomist has some control over their working postures within this task, the duration of sustained seated postures within a day is typically 60 minutes before a postural break is taken. Depending on the nature of the project and work day, Managing Ergonomists may resume seated postures following postural breaks for the majority of their day.

<b>Reach</b>			
<i>Vertical Reach - Range (cm)</i>	<i>Vertical Reach - Usual (cm)</i>	<i>Horizontal Reach - Range (cm)</i>	<i>Horizontal Reach - Usual (cm)</i>
30 - 160 cm	75 - 140 cm	0 - maximum arm's reach	0 - 50 cm

<b>Lifting Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Horizontal Load Distance</i> <i>(distance of knuckles away from body)</i>	Distance of comfort	Notebook: <1 kg Laptop Computer/Supplies: 4.5 kg	Variable: Up to 4 times per shift
<i>Vertical Load Distance</i> <i>(height of load at start of lift)</i>	Notebooks, reference materials, Laptop Computer and accessories: varies from 30 - 90cm		
<i>Vertical Lifting Distance</i> <i>(distance that the load is lifted through)</i>	Variable but typically onto desk or working surface/laptop stand.		

<b>Carrying Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm,m)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Vertical Position of Load</i>	Height of comfort	Notebook: <1 kg	Variable as directly dependent on project/client being supported.  Managing Ergonomists have access to rolling bags to transport equipment instead of carrying it.
<i>Horizontal Position of Load</i>	Distance of comfort	Laptop Computer/ Supplies: 4.5 kg	
<i>Distance Carried</i>	Variable: Typically <1 to 1000 m	<i>*May be required while climbing stairs into/out of working location</i>	

<b>Pushing/Pulling Parameters</b>			
<i>Hand Height (cm)</i>	<i>Initial (kg)</i>	<i>Distance of Push</i> <i>(up to 2m, 2-7.5m, &gt;7.5m)</i>	<i>Frequency</i>
Roller bag: variable, 70 - 100 cm	Variable: < 5kg	Variable: Typically <1 to 1000 m	Variable: Up to 4 times per shift

<b>Postures</b>			
<i>Upper Extremity</i>		<i>Lower Extremity</i>	
<i>Neck:</i>	0 - 45 deg flex and rot'n	<i>Torso:</i>	0 - 90 deg flex, primarily when in seated postures
<i>Shoulder:</i>	0 - 120 deg flex, 0 - 120 deg abduct	<i>Hip/Knee/Ankle:</i>	Used to sit, stand, and squat/crouch
<i>Elbow:</i>	0 - 180 deg flex/ext		
<i>Wrist:</i>	+/- 20 deg flex/ext/dev'n		
<i>Finger Demands/Dexterity</i>		<i>General Demands</i>	
<i>Hand</i>	Grip - Power and Pinch	<i>Mobility</i>	Sitting and walking
<i>Fingers</i>	Handing and Fine finger movements	<i>Other</i>	Standing, crouching, squatting, and climbing stairs

## Physical Demands Summary

**Task #3:** Supporting development of client and business opportunities while managing existing project plans/client expectations.

**Details:** Identifying and scoping client and business opportunities is an ongoing activity that requires Managing Ergonomists to demonstrate creativity and business acumen to develop potential opportunities. Managing Ergonomists also provides direction to Supervisory Ergonomists and staff to support overall progress to project plans and client/company expectations. Working closely with Supervisory Ergonomists provides Managing Ergonomists with insight into potential project bottlenecks or areas of concern and allows them to provide coaching to ensure project scope is maintained and client deliverables are achieved.

This task is primarily cognitive, occurring during and throughout all other tasks. However, since focussed activity around this task will be completed during desk based tasks, related physical demands to this environment have been presented below.

Reach			
Vertical Reach - Range (cm)	Vertical Reach - Usual (cm)	Horizontal Reach - Range (cm)	Horizontal Reach - Usual (cm)
30 - 160 cm	75 - 140 cm	0 - maximum arm's reach	0 - 50 cm

Lifting Parameters			
Parameter	Measurement (cm)	Weight (kg)	Frequency
Horizontal Load Distance (distance of knuckles away from body)	Distance of comfort	Notebook: <1 kg  Laptop Computer/Supplies: 4.5 kg	Variable: Up to 4 times per shift
Vertical Load Distance (height of load at start of lift)	Notebooks, reference materials, Laptop Computer and accessories: varies from 30 - 90cm		
Vertical Lifting Distance (distance that the load is lifted through)	Variable but typically onto desk or working surface/laptop stand.		

Carrying Parameters			
Parameter	Measurement (cm,m)	Weight (kg)	Frequency
Vertical Position of Load	Height of comfort	Notebook: <1 kg	Variable as directly dependent on project/client being supported.
Horizontal Position of Load	Distance of comfort	Laptop Computer/ Supplies: 4.5 kg	
Distance Carried	Variable: Typically <1 to 1000 m	*May be required while climbing stairs into/out of working location	

Pushing/Pulling Parameters			
Hand Height (cm)	Initial (kg)	Distance of Push (up to 2m, 2-7.5m, >7.5m)	Frequency
Roller bag: variable, 70 - 100 cm	Variable: < 5kg	Variable: Typically <1 to 1000 m	Variable: Up to 4 times per shift

Postures			
Upper Extremity		Lower Extremity	
Neck:	0 - 45 deg flex and rot'n	Torso:	0 - 90 deg flex, primarily when in seated postures
Shoulder:	0 - 120 deg flex, 0 - 120 deg abduct	Hip/Knee/Ankle:	Used to sit, stand, and squat/crouch
Elbow:	0 - 180 deg flex/ext		
Wrist:	+/- 20 deg flex/ext/dev'n		
Finger Demands/Dexterity		General Demands	
Hand	Grip - Power and Pinch	Mobility	Sitting and walking
Fingers	Handing and Fine finger movements	Other	Standing, crouching, squatting, and climbing stairs

## Physical Demands Summary

### Task #4: Instructing and facilitating training sessions

**Details:** Managing Ergonomists may be required to instruct and facilitate training sessions at various client locations. Depending on the client, this may only include setting up computer but could also include setting up the audio/visual equipment, as well as moving chairs and tables to create a positive training layout. Training sessions may be delivered at client locations in conference rooms, at hotel type locations, or via webinar format. Throughout instructing and facilitating the training session, a Managing Ergonomist may be required to provide demonstrations of tasks, ideal work methods, and various postures. As a result, the postures and movements required will vary depending on the topic of training delivered. Depending on the type and duration of training session, a Senior Ergonomist may stand/walk for between 1 - 2 hours at a time while presenting material before a 15 minute break. For full day training sessions they would be required to stand for the duration of the session other than 15 min breaks and a lunch break.

<b>Reach</b>			
<i>Vertical Reach - Range (cm)</i>	<i>Vertical Reach - Usual (cm)</i>	<i>Horizontal Reach - Range (cm)</i>	<i>Horizontal Reach - Usual (cm)</i>
0 - 200 cm	75 - 185 cm	0 - maximum arm's reach	0 - 50 cm

<b>Lifting Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Horizontal Load Distance</i> <i>(distance of knuckles away from body)</i>	Distance of comfort	Laptop computer, handouts, In-Focus machine: Up to 6 kg	Variable Up to 4 times per shift
<i>Vertical Load Distance</i> <i>(height of load at start of lift)</i>	Notebooks, reference materials, Laptop Computer and accessories: varies from 30 - 90cm		
<i>Vertical Lifting Distance</i> <i>(distance that the load is lifted through)</i>	Variable but typically onto table or working surface/lecturn.		

<b>Carrying Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm,m)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Vertical Position of Load</i>	Height of comfort	Laptop Computer/ Supplies: Up to 6 kg  *May be required while climbing stairs into/out of working location	Variable Up to 4 times per shift  Managing Ergonomists have access to rolling bags to transport items instead of carrying them.
<i>Horizontal Position of Load</i>	Distance of comfort		
<i>Distance Carried</i>	Variable: Typically <1 to 1000 m		

<b>Pushing/Pulling Parameters</b>			
<i>Hand Height (cm)</i>	<i>Initial (kg)</i>	<i>Distance of Push</i> <i>(up to 2m, 2-7.5m, &gt;7.5m)</i>	<i>Frequency</i>
1. Doors (100 - 110 cm) 2. Overhead screen (up to 200 cm) 3. Rolling laptop / office bag (70 - 100 cm)	1. Doors: 3 to 5 kg 2. Overhead screen: 1 to 2 kg 3. Rolling bag: <5 kg	1. Doors: Minimal <1 m 2. Overhead screen: <1 m 3. Rolling bag: <1 to 1000 m	Variable Up to 4 times per shift

<b>Postures</b>			
<i>Upper Extremity</i>		<i>Lower Extremity</i>	
<i>Neck:</i>	0 - 45 deg flex, 0 - 30 deg ext, 0 - 45 deg rot'n	<i>Torso:</i>	0 - 90 deg flex, primarily when in seated postures
<i>Shoulder:</i>	0 - 180 deg flex, 0 - 180 deg abduct	<i>Hip/Knee/Ankle:</i>	Used to sit, stand, walk, climb and squat/crouch
<i>Elbow:</i>	0 - 180 deg flex/ext		
<i>Wrist:</i>	+/- 30 deg flex/ext/dev'n		
<i>Finger Demands/Dexterity</i>		<i>General Demands</i>	
<i>Hand</i>	Grip - Pinch and Power	<i>Mobility</i>	Stand and walk
<i>Fingers</i>	Handling and Fine finger movements	<i>Other</i>	Sitting, crouching, squatting, and climbing stairs



## Physical Demands Summary

**Task #5:** Travelling between and to client locations

**Details:** Depending on the projects being supported, Managing Ergonomists may be required to travel between client locations on the same day. Travelling between clients may require Managing Ergonomists to load/unload their vehicle with equipment/supplies needed to support the data collection or training session. Travelling distances will vary depending on client support, up to 60 minute sustained sitting tolerances may be required.

<b>Reach</b>			
<i>Vertical Reach - Range (cm)</i>	<i>Vertical Reach - Usual (cm)</i>	<i>Horizontal Reach - Range (cm)</i>	<i>Horizontal Reach - Usual (cm)</i>
30 - 200 cm	85 - 105 cm	0 - 75 cm	0 - 55 cm

<b>Lifting Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Horizontal Load Distance</i> <i>(distance of knuckles away from body)</i>	Up to 65 cm	Equipment/Supplies/Laptop/ Personal bags: Up to 6 kg	Variable
<i>Vertical Load Distance</i> <i>(height of load at start of lift)</i>	Varies, typically from 30 - 90cm		
<i>Vertical Lifting Distance</i> <i>(distance that the load is lifted through)</i>	30 - 120 cm		

<b>Carrying Parameters</b>			
<i>Parameter</i>	<i>Measurement (cm,m)</i>	<i>Weight (kg)</i>	<i>Frequency</i>
<i>Vertical Position of Load</i>	Height of comfort	Equipment/Supplies/Laptop/ Personal bags: Up to 6 kg	Variable Up to 4 times per shift
<i>Horizontal Position of Load</i>	Distance of comfort		Managing Ergonomists have access to rolling bags to transport items instead of carrying them.
<i>Distance Carried</i>	Variable: Typically <1 to 1000 m		

<b>Pushing/Pulling Parameters</b>			
<i>Hand Height (cm)</i>	<i>Initial (kg)</i>	<i>Distance of Push</i> <i>(up to 2m, 2-7.5m, &gt;7.5m)</i>	<i>Frequency</i>
1. Open/close vehicle doors (80 - 110 cm) 2. Shifting gears (60 cm) 3. Engaging parking brake (60 - 70 cm) 4. Office/plant doors (100 - 110 cm) 5. Rolling laptop / Office Bag (90 - 100 cm)	1. 3 to 5 kg 2. 1 to 2 kg 3. 1 to 2 kg 4. 3 to 5 kg 5. <5 kg	1. Minimal, <1 m 2. Minimal, <1 m 3. Minimal, <1 m 4. Minimal, <1 m 5. <1 to 1000 m	Variable, up to 4 trips per shift.

<b>Postures</b>			
<i>Upper Extremity</i>		<i>Lower Extremity</i>	
<i>Neck:</i>	0 - 45 deg flex, 0 - 30 deg ext, 0 - 45 deg rot'n	<i>Torso:</i>	0 - 90 deg flex, primarily when in seated/driving postures
<i>Shoulder:</i>	0 - 180 deg flex, 0 - 180 deg abduct	<i>Hip/Knee/Ankle:</i>	Used to sit, stand, walk and operate pedals to drive vehicle
<i>Elbow:</i>	0 - 180 deg flex/ext		
<i>Wrist:</i>	+/- 30 deg flex/ext/dev'n		
<i>Finger Demands/Dexterity</i>		<i>General Demands</i>	
<i>Hand</i>	Grip - Power and Pinch	<i>Mobility</i>	Sitting
<i>Fingers</i>	Handling and Fine fingering	<i>Other</i>	Climbing in/out of vehicle

## Summary of Additional Specific Requirements

Cognitive Demands	Required	Comments or Details
<b>Hearing</b>		
Conversation	X	With co-workers, management team and clients
Other Sounds	X	Announcements and alarms
<b>Vision</b>		
Near	X	Computer work, paperwork, and data collection
Far	X	Navigating throughout client locations and driving
Colour	X	Computer work and during data collection
<b>Perception</b>		
Spatial Form	X	Data collection
Feeling	X	Data collection
Reading	X	Computer work, paperwork, and driving
Writing	X	Data collection, paperwork and analysis
Speech	X	With co-workers, management team and clients

Environmental Demands	Required	Comments or Details
Air borne particles	X	May be exposed depending on client (i.e. health care, hospitals)
Noise	X	Hearing protection may be required depending on the client
Hazardous machines/tools	X	May be exposed depending on client
Radiant/thermal energy	X	May be exposed depending on client
Congested work site	X	May be exposed depending on client

Conditions of Work	Required	Comments or Details
Work alone	X	May support independent projects
Work Independently but in a team	X	May support independent projects, but works as a larger part of a consulting team
Deadline pressure	X	Required to meet client deadlines
Operate equipment/machinery	X	Tools required for data collection and analysis (i.e. camera, force gauge, scale, tape measure, computer)
Shift work	X	Typically day shift support, but afternoon or night support may be required depending on client requests

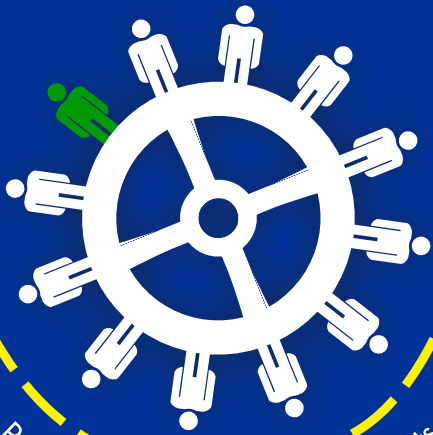
Personal Protective Equipment	Required	Comments or Details
Safety glasses	X	May be required depending on client
Hard hat	X	May be required depending on client
Jacket/sleeves/paint suit	X	May be required depending on client
Safety shoes	X	May be required depending on client
Hearing protection	X	May be required depending on client
Safety vest	X	May be required depending on client
Gloves	X	May be required depending on client
Face mask	X	May be required depending on client

**Psychological / Cognitive Job Demands Analysis**

Category	Area of Focus <i>Description / Definition</i>	Managing Ergonomist <i>Micro= 25% / Meso= 50% / Macro= 25%</i>
Degree of Self-Supervision Required	The ability to work effectively without supervision. When required, the worker is expected to exercise good problem solving and judgement.	Self-supervised with contact with fellow Management only as needed.
Degree of Supervision Exercised	The extent of work direction and/or supervision provided to other consultants.	Provide coaching and are responsible for Safety, Cost, Quality, Financial, Policy, and Staffing associated with the projects and staff they are supervising, in addition to the company as a whole as an active member of the Management team.  CCCPE: Responsible for maintaining professional accountability for all work which they assign including assessments and documentation. Includes evaluating the knowledge, experience, skill, and judgment of the personnel being supervised to ensure they are competent to perform any activity that is assigned to them.
Time Pressures	The extent to which work tasks are expected to be completed within a given time period or the extent to which a fast work pace is required because of the nature of the work or work volume.	Able to manage ongoing pressure to meet deadlines, work within time constraints, and/or support a high volume of work and fast pace of work. Able to complete tasks, and ensure managed staff complete projects, within required timelines. May be required to extend work day to manage unique scenarios.
Attention to Detail	The ability to support work tasks that require attention to or concentration on details of information. This demand implies that insufficient attention to detail will result in work errors and/or inefficiencies.	Intense attention to detail or concentration is required for all tasks. Able to apply macro level common sense/logic checks to meso and micro detail in all areas.
Performance of multiple tasks	The ability to perform and/or monitor more than one task at a time and to be able to judge when tasks require attention. The ability to prioritize tasks and manage time effectively (juggle various tasks efficiently) is required.	Constantly responsible for multiple concurrent tasks and projects. Must exercise a high degree of time management skill and judgement for successful ongoing establishment of priorities and guiding staff.
Exposure to distracting stimuli	The ability to perform work duties without distraction from visual, auditory or other sensory stimuli. May include verbal conversations of colleagues in an open office area, phones ringing, and movement of people.	Constantly responsible for multiple concurrent tasks and projects. Must exercise a high degree of time management skill and judgement for successful ongoing establishment of priorities and guiding staff.
Need to work co-operatively with others	The ability to work co-operatively with others. This may include team projects, shared job duties, interacting with Management, etc. This requires one to have good communication skills, good teamwork and interpersonal skills, be open minded, diplomatic or have good negotiation skills.	Able to work in close co-operation with others and support team dynamics on constant basis.  Able to support colleagues on a coaching basis.
Exposure to emotional or confrontational situations	Exposure to situations in which a client or the public may be emotional or confrontational and the consultant is required to interact with the individual in order to complete a job requirement. These scenarios may be in person or over the telephone.	Daily exposure to emotional or confrontational circumstances or individuals with whom the Manager must interact in order to ensure expectations are met.

**Psychological / Cognitive Job Demands Analysis**

Category	Area of Focus <i>Description / Definition</i>	Managing Ergonomist <i>Micro= 25% / Meso= 50% / Macro= 25%</i>
Responsibility and accountability	The extent of liability or safety risk that could result if the consultant does not exercise appropriate judgement or attention, or follow policies, procedures, and processes during the performance of job tasks.	Errors in judgement or attention would result in liability or risks ranging from serious legal consequences, breach of contract, significant expense, or health and safety risks to clients, colleagues, or the company.
Reading literacy	The ability to read and comprehend English text and written documents.	A high degree of reading literacy is required to read reports, references, policies (OI and client), legal documents or agreements, with a high degree of comprehension.
Written literacy	The ability to create English text within generally accepted grammar and spelling norms.	Able to prepare any written communication with accurate spelling, grammatical construction, professional format (pdf margins, titles, fonts, sizes of fonts), concise, clarity, and/or careful wording. Able to edit and polish any written communication to finished product quality and provide written feedback/corrections.
Data Analytics	The ability to process, analyze, and comprehend numerical information even if the calculation is performed electronically.	Able to create, understand, and explain complex arithmetic operations and abstract mathematical formulae. Able to apply macro level common sense/logic checks to meso and micro detail to ensure finished product quality.
Computer literacy	The extent to which a job requires the ability to use computer technology	Able to use standard computer programs (e.g. Excel, WORD, Power Point, video conferencing) and smart phones (text, emails, Apps) and any software clients may introduce at an advanced level and apply problem solving skills as required.
Verbal Communication	The ability to clearly comprehend and express ideas and information in spoken English.	Communication skills are required to comprehend and communicate complex information fluently and or communicate effectively in complex and/or confrontational situations e.g. explaining policies, conflict resolution, explaining negative/gaps in support to clients, explaining key decision points in project development/execution, etc.  Able to pivot to take advantage of unique opportunities e.g. marketing opportunities, potential areas of scope creep, etc.
Memory	The ability to retrieve and recall information on demand that has been previously learned.	Able to recall many pieces of detailed information, previous experiences/historical examples, policies, procedures, and processes which may have to be recalled in demanding or time sensitive situations ie. due to deadlines, within unplanned and one off situations, etc.
Resilience	The ability to recover quickly from difficulties; toughness, grit.	Able to demonstrate self awareness and communicate accordingly to ensure you are able to recover quickly from difficulties and demonstrate toughness and grit on an ongoing basis.
Decision Making	The ability to consider relevant details/criteria and come to a conclusion.	Able to confidently and independently review information, consider new methodologies/ areas of focus (OI, industry accepted standards, etc.), identify conclusions, and explain rationale used.  Able to apply macro and meso level common sense/logic checks to micro detail to verify product quality and decision logic.



Professional Ergonomic Consultants

Ergonomics is fitting the task to the person  
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