

## **Hamilton Municipal Employees Credit Union**

# **HMECU's Accessibility for Ontarians with Disabilities Policies**

*Accessible Member Service Policy  
Integrated Accessibility Standards Policy*

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# Accessible Member Service Policy

## 1 Accessible Member Service Policy

### Purpose

In 2005, the government of Ontario passed the Accessibility for Ontarians with Disabilities Act (AODA). The goal of the Ontario government is to make Ontario accessible to all persons with disabilities by 2025. This policy relates to the Accessibility Standards for Customer Service

### Policy Statement

The mission of HMECU is to provide the best care of our members' financial needs.

In fulfilling our mission, HMECU strives at all times to provide its products and services in a way that respects the dignity and independence of people with disabilities. We are also committed to giving people with disabilities the same opportunity to access our products and services and allowing them to benefit from the same services, in the same place and in a similar way as other Members.

### Application of the Accessible Member Service Policy

The Accessible Member Service Policy applies to all Employees of the Credit Union. In this policy, the term "Employee" includes all staff, contract service providers and directors of the Credit Union.

### Definitions

"*Assistive devices*" shall mean an auxiliary aid such as communication aids, cognition aids, personal mobility aids and medical aids (i.e. canes, crutches, wheelchairs, or hearing aids).

"*Employees*" shall mean every person who deals with members of the public or other third parties on behalf of HMECU, whether the person does so as an employee, agent, volunteer or otherwise.

"*Persons with Disabilities*" shall mean those individuals who have a disability. "Disability" as defined under the Ontario Human Rights Code is:

- Any degree of physical disability, infirmity, malformation or disfigurement that is caused by bodily injury, birth defect or illness and, without limiting the generality of the foregoing, includes diabetes mellitus, epilepsy, a brain injury, any degree of paralysis, amputation, lack of physical co-ordination, blindness or visual impediment, deafness or hearing impediment, muteness or speech impediment, or physical reliance on a guide dog or other animal or on a wheelchair or other remedial appliance or device;
- A condition of mental impairment or a developmental disability;

- A learning disability, or a dysfunction in one or more of the processes involved in understanding or using symbols or spoken language;
- A mental disorder, or;
- An injury or disability for which benefits were claimed or received under the insurance plan established under the *Workplace Safety and Insurance Act, 1997*.

“*Service Animals*” shall mean any animal individually trained to do work or perform tasks for the benefit of a person with a disability.

“*Support persons*” shall mean any person whether a paid professional, volunteer, family member, or friend who accompanies a person with a disability in order to help with communications, personal care or medical needs or with access to products or services.

## **Providing Products and Services to People with Disabilities**

HMECU is committed to excellence in serving all Members including people with disabilities and we will carry out our functions and responsibilities in the following areas:

### **Communication**

We will communicate with people with disabilities in ways that take into account their disability.

We will train staff who communicate with Members on how to interact and communicate with people with various types of disabilities.

### **Telephone services**

We are committed to providing fully accessible telephone service to our Members. We will train staff to communicate with Members over the telephone in clear and plain language and to speak clearly and slowly.

We will offer to communicate with Members by telephone relay, email, courier, mail and/or fax, if telephone communication is not suitable to their communication needs or is not available, provided the identity of the Member has been verified.

### **Assistive devices**

We are committed to serving people with disabilities, who use assistive devices to obtain, use or benefit from our products and services. We will ensure that our staff are trained and familiar with various assistive devices that may be used by Members with disabilities while accessing our products or services.

We will also ensure that staff will know how to use, and instruct others in the use of, assistive devices if they are available for Members at HMECU sites.

## **Financial Documents**

We are committed to providing accessible financial documents to all of our Members. For this reason, financial documents will be provided in the following formats upon request: hard copy, email.

We will answer any questions Members may have about the content of statements or notifications in person, by telephone or email, provided the identity of the Member has been verified.

## **Service Animals**

We are committed to welcoming people with disabilities who are accompanied by a service animal on the parts of our premises that are open to the public and other third parties. We will also ensure that all staff, volunteers and others dealing with the public are properly trained in how to interact with people with disabilities who are accompanied by a service animal.

## **Support Persons**

We are committed to welcoming people with disabilities who are accompanied by a support person. Any person with a disability who is accompanied by a support person will be allowed to enter HMECU's premises with his or her support person. At no time will a person with a disability who is accompanied by a support person be prevented from having access to his or her support person while on our premises.

Where confidentiality is important because of the kinds of information discussed, HMECU must obtain the consent of the member and may require the support person to sign a confidentiality agreement.

If fees will be charged for support persons at HMECU events, the amount charged to the support person will be announced ahead of time.

## **Notice of temporary disruption**

HMECU will provide Members with notice in the event of a planned or unexpected disruption in the facilities or services usually used by people with disabilities. This notice will include information about the reason for the disruption, its anticipated duration, and a description of alternative facilities or services, if available.

The notice will be placed at all public entrances and service counters on our premises, and on the HMECU website.

## **Training for Staff**

HMECU will provide training to all employees, volunteers and others who deal with the public or other third parties on their behalf, and all those who are involved in the development and approval of Member service policies, practices and procedures. Individuals in the following positions will be trained:

Member Service Representatives, Lending Service Representatives, Financial Planners, Managers, Board of Directors, Head Office and Administrative Staff, and Branch Staff

This training will be provided during the new employee orientation period, which shall occur during the first 30 days after an employee commences their duties.

Training will include the following:

- The purposes of the Accessibility for Ontarians with Disabilities Act, 2005 and the requirements of the Customer Service Standard
- How to interact and communicate with people with various types of disabilities
- How to interact with people with disabilities who use an assistive device or require the assistance of a service animal or a support person
- How to use the assistive devices on HMECU sites that may help with the provision of products or services to people with disabilities
- What to do if a person with a disability is having difficulty in accessing HMECU's products and services
- HMECU's policies, practices and procedures relating to the Customer Service Standard.

Applicable staff will be trained on policies, practices and procedures that affect the way products and services are provided to people with disabilities. Staff will also be trained on an ongoing basis when changes are made to these policies, practices and procedures.

## **Feedback Process**

The ultimate goal of HMECU is to meet and surpass Member expectations while serving Members with disabilities. Comments on our services regarding how well those expectations are being met are welcome and appreciated.

Feedback regarding the way HMECU provides products and services to people with disabilities can be made by email, verbally, or through on-site suggestion boxes. All feedback will be directed to the Chief Executive Officer or another Senior Manager. Members can expect to hear back in 10 business days.

## **Modifications to Policies**

We are committed to developing Member service policies that respect and promote the dignity and independence of people with disabilities. Therefore, no changes will be made to this policy before considering the impact on people with disabilities.

Any policy of HMECU that does not respect and promote the dignity and independence of people with disabilities will be modified or removed.

## **Questions about this policy**

This policy exists to achieve service excellence to Members with disabilities. If anyone has a question about the policy, or if the purpose of a policy is not understood, an explanation should be provided by, or referred to, the VP of Human Resources of HMECU.

## **2 Accessible Member Service Practices and Procedures**

### **2.1 Communication**

We will communicate with people with disabilities in ways that take into account their disability, in a manner that respects their dignity and independence. For tips on communicating with people with different disabilities refer to the **Accessible Member Service Resource Guide** in your orientation package.

#### **2.1.1 Telephone Communication using the Relay Service**

When communicating with people who are Deaf, Oral Deaf, deafened or hard of hearing you may need to use the telephone Relay Service:

1. Phone the Relay Service number **1-800-855-0511**
2. Tell the operator your name, the name of the person you are calling, and the number you wish to reach.
3. The operator will make the call for you. You speak to the operator as if you were talking directly to the person you are calling. For example, say “Hi, How are you doing?” Do not say: “Tell him I said hello”.
4. Remember to say “Go ahead” when you finish speaking, so the person on the other end will know it is their turn to speak.
5. If you normally speak very quickly, the operator may ask you to speak more slowly so your message can be typed while you are speaking.

### **2.2 Financial Documents**

When providing financial documents to a member with a disability, HMECU will provide the document, or the information contained in the document, in a format that takes the member’s disability into account. Staff will ask our members with disabilities if they require information/documentation in an alternate format. HMECU will notify members by posting notice of availability of documents in a conspicuous place on our premises, and all future forms, documents, and notifications will include “Alternative format available upon request”.

At this time HMECU documents can be provided in the following formats: hard copy, Braille, by email, by phone. Furthermore, any future in-house forms that would normally be available for the public will be created with plain language.



### **2.2.1 Phone Service**

When a member requires information from a statement or notification over the phone, confirmation **must** be made to ensure that it is actually the member requesting this change:

- The members must be able to provide personal information in order to identify themselves.
- Explain to the member the reason for the request for identification (fraud prevention).
- Ask for the member's date of birth, address including postal code, and account details. If the member hesitates in providing this information, refer to management.
- Once you have been able to identify the member, proceed with providing information on the member's statement or notification.
- Record how the member was identified i.e. date of birth, address, and account details.

### **2.2.2 Braille**

- The Service Representative will contact the Branch Manager
- The Branch Manager will send the document to the Alternative Format Service Provider (See 'List of External Alternative Format Providers')
- The Branch Manager will make reasonable efforts to get the document to the member within 10 business days.

## **2.3 Support Persons**

HMECU is committed to welcoming members with disabilities who are accompanied by a support person. At no time will a member who is accompanied by a support person be prevented from having access to his or her support person while on our premises.

### **2.3.1 Use of support persons**

Support persons may be a family member, friend or a trained professional. They provide a wide range of assistance to persons with disabilities including but not limited to assistance with communication, personal care and assistance accessing products and services.

If a support person accompanies a person with a disability, HMECU shall ensure that both persons are permitted to enter the premises together and that the person with a disability is not prevented from having access to their support person while on the premises.

The member shall determine whether a support person is necessary; however, in the exceptional circumstance where staff believes that a support person should be in attendance to protect the health and safety of the member or others the following criteria shall be used in consulting with the member:

- When there is a significant risk to the health and safety of the person with a disability or others (the mere possibility of risk is insufficient);

- When the risk is greater than the risk associated with other members;
- When the risk cannot be eliminated or reduced by other means;
- When the assessment of the risk is based on consideration of the duration of the risk, the nature and severity of the potential harm, the likelihood that the potential harm will occur, and the imminence of the potential harm;
- When the assessment of the risk is based on the individual's actual characteristics, not merely on generalizations, misperceptions, ignorance or fears about a disability.

### **2.3.2 Support Persons and Fees**

Although, HMECU typically does not charge fees in relation to a support person's presence on HMECU premises, HMECU will provide advanced notice in the event a fee is ever charged. Advanced notice will be given where information about fees are typically provided.

### **2.3.3 Dealing with Confidential Matters in the Presence of Support Persons**

In some cases, a support person may have to agree to rules or requirements that are specific to the kinds of products and services that HMECU offers.

Where confidentiality is important because of the kinds of information discussed, HMECU must obtain the consent of the member and may require the support person to sign a confidentiality agreement. As an option, in some situations it may be suitable for a support person to wait in a separate area while a member's confidential matters are addressed.

## **2.4 Notice of Disruption of Services**

HMECU will provide our Members with a reasonable amount of notice in the event of a planned service disruption that affects access to our facilities or services (i.e. Elevators, accessible parking spaces, etc.).

In the event of an unexpected disruption of service, HMECU will provide notice as soon as possible. During the disruption, we will make every effort to provide alternative accommodations that take into consideration the needs of the individual.

### **2.4.1 Notifying the Public of a Service Disruption**

To communicate any disruptions to HMECU's facilities or services:

1. Notify the Branch Manager. An estimate will be determined of the time it will take to address the issue.
2. The Branch Manager will post a 'Notice of Service Disruption' at the site of the disruption.
3. In the case of a disruption that requires people to make alternate arrangements before coming to the site or satellite locations (disruption to accessible parking spaces, accessible entrances, elevators, etc.) the Branch Manager will contact the Marketing Coordinator who will coordinate the posting of a notice on the HMECU website.

4. For members that have appointments scheduled with HMECU, staff will notify the member and make other arrangements to meet.
5. Updates to the notice of disruption should be made as needed and posted accordingly.
6. Once the issue is resolved and/or repair completed, the location posting the notice will remove signs and contact the Marketing Coordinator to remove notice from the website.

#### **2.4.2 Notice of disruption will include the following information:**

- The nature of the disruption in service
- The reason for disruption
- The expected duration of the disruption
- A description of alternatives to service, if available
- A contact number for more information

### **2.5 Training**

The Accessible Customer Service Standard requires Employers to train staff on how to properly provide member service to people with disabilities. Training will include:

- The purposes of the Accessibility for Ontarians with Disabilities Act, 2005 and the requirements of the Customer Service Standard
- How to interact and communicate with people with various types of disabilities
- How to interact with people with disabilities who use an assistive device or require the assistance of a service animal or a support person
- How to use the assistive devices on HMECU sites that may help with the provision of products or services to people with disabilities
- What to do if a person with a disability is having difficulty in accessing HMECU's products and services
- HMECU's policies, practices and procedures relating to the Customer Service Standard.

#### **2.5.1 Timeline for Training**

Training will be provided as a priority for new hires and included in the new employee orientation package and shall occur during the first 30 days after an employee commences their duties.

Training will also be provided with any change to HMECU's policies, procedures and practices governing the provision of services to persons with disabilities.

#### **2.5.2 Training Records**

HMECU will keep records of all accessible member service training, to include dates and content of training provided to each staff member.

Provision of accessible member service to persons with disabilities will be reviewed with staff annually.

## **2.6 Feedback**

The Customer Service Standard requires that a process be in place for receiving and responding to feedback about how products or services are provided to people with disabilities.

The ultimate goal of HMECU is to meet and surpass member expectations while serving members with disabilities. Comments on our services regarding how well those expectations are being met are welcomed and appreciated.

Feedback regarding the way HMECU provides products and services to people with disabilities can be made by email, verbally, or through on-site suggestion boxes.

Information about the feedback process will be made readily available to the public and notice of the process will be posted on HMECU's website and/or in other appropriate locations.

All feedback will be kept in strict confidence and used to improve member services.

### **2.6.1 Feedback mechanisms**

- Online Accessible Customer Service questionnaire
- Print format Accessible Customer Service Questionnaire at HMECU sites, available in standard and large print.
- By phone: 905-575-8888; 1-866-808-2888 (Toll-free); 905-520-1146 (24 Hour Emergency number)

### **2.6.2 Feedback Procedures**

- The author of the feedback will be provided a response within 10 business days in the format in which the feedback was received outlining actions deemed appropriate, if any.
- The Chief Executive Officer or another Senior Manager will review all feedback in order to monitor accessibility concerns and our progress.
- Should feedback include individual staff members, management will meet with staff member to discuss/remedy, as appropriate.

# **Integrated Accessibility Standards Policy**

## **3 Integrated Accessibility Standards Policy**

### **Purpose**

HMECU is committed to ensuring that all members and employees feel valued and are treated with respect. In 2005, the government of Ontario passed the Accessibility for Ontarians with Disabilities Act (the “AODA”). The goal of the Ontario government is to make Ontario accessible to all persons with disabilities by 2025. This section of the policy, Integrated Accessibility Standards (IAS) will focus on the requirements for Information and Communication Standards and Employment Standards.

### **Application of the Integrated Accessibility Standards Policy**

The IASR applies to all Employees of the Credit Union.

#### **3.1 Information and Communications Standard**

*HMECU will provide when requested the Information and Communications Standard in an accessible manner to members and employees with disabilities.*

#### **Definitions**

“Information” as used in the Information and Communications Standard, is defined as knowledge, data and facts that convey meaning and that exist in any format, such as text, audio, digital or images.

“Communication” as used in the Information and Communications Standard, refers to the interaction between two or more people or entities when information is provided, sent or received.

##### **3.1.1 Website and Web Content**

HMECU has ensured that their website and web content is accessible according to the World Wide Web Consortium’s Web Content Accessibility Guidelines (WCAG). HMECU along with an outsourced website developer will continue to ensure that all new content on the website conforms to WCAG 2.0.

HMECU is committed to providing employees and members with accessible formats and communication supports when requested. Please refer to section 3.1.2 for accessible formats and communications supports provided by HMECU.

### **3.1.2 Accessible Formats and Communications Supports**

HMECU is dedicated to providing accessible formats and communications support in a timely manner and at no additional cost to the members. The accessible formats and communications support that we will provide are but not limited to:

1. If the member, due to vision impairments cannot read the pamphlets or information provided on the website or in branch they can request text-only files.
2. The member will have the option on the website to increase the size of the text.
3. Staff members may read written information to the person directly.
4. HMECU when requested can provide members with audio formats.
5. If dealing with a person who has hearing loss, can use handwritten notes or the computer instead of spoken words.
6. Ensuring that policies are written in plain language.
7. When posting videos on the website HMECU will provide captions for those with hearing impairments.
8. Assistive listening systems.

### **3.1.3 Feedback**

Under the Accessibility Standard for Customer Service, HMECU had developed customer service feedback processes for receiving and responding to feedback about how products or services are provided to people with disabilities. This process is located under section 2.6 of the AODA Policy.

The Information and Communication Standards, requires that all types of external or internal feedback processes to receive and respond to members and/or employees be accessible to people with disabilities. HMECU may request at times feedback from members and/or employees through online surveys or forms, by email, by phone, or in print. HMECU will arrange accessible formats and communication supports on request by either members or employees. HMECU will ensure that there is proper notification to the members that these accessible formats and communication supports are available.

### **3.1.4 Emergency Procedures, Plans or Public Safety Information**

#### **Members**

HMECU will provide at the request of the members, an accessible format of our emergency escape plans. At each of the branch locations there is an emergency escape plan posted and they are visible for members to see. The emergency escape plans are located as follows at each branch (See Appendix A for copies of plans):

Limeridge	At this location the Emergency Escape Plans are posted at the front entrance, back entrance and in the basement hallway.
Main West	At this location the Emergency Escape Plans are posted at the front entrance, at the back of the loan offices and at the back exit.
Brantford	At this location the Emergency Escape Plans are posted at the front entrance, back entrance and the lunchroom.

## Employees

HMECU will provide employees accessible formats or communication supports of the emergency plan checklist when requested. See Appendix B for copy of the emergency plan checklist.

## 3.2 Employment Standards

### 3.2.1 Definition of Employment Standards

The Accessibility Standard for Employment requires that HMECU have processes in place to determine an employee's accommodation needs. The Ontario Human Rights Code requires all employers to meet the accommodation needs of employees with disabilities to the point of undue hardship. The Employment Standard builds on this requirement and applies to these human resource activities:

- Developing and documenting individual accommodation plans for employees with disabilities
- Recruitment, assessment and selection and informing employees of supports
- Accessible formats and communication supports
- Workplace emergency response information
- Facilitating return to work
- Performance management, redeployment and career development and advancement

The Employment Standards apply to paid employees. It does not apply to volunteers and other non-paid individuals.

### 3.2.2 Informing Employees

HMECU is committed to informing all employees, both new and existing, of their accessible employment practices. Part of this commitment is providing job accommodations that take into account an employee's accessibility needs due to disability. HMECU wants to ensure that all employees are aware of how the company will support them if they have a disability or should they acquire a disability later in their career.

### **3.2.3 Accessible Recruitment Process**

HMECU is dedicated to making the recruitment process accommodating for job applicants with disabilities.

#### *Advertising Job Positions*

HMECU will state when advertising job positions that accommodations for job applicants with disabilities are available upon request.

#### *When Inviting Job Applicants to Participate in the Selection Process*

When inviting job applicants to participate in the selection process, HMECU will outline that accommodations are available on request to support their participation. HMECU will ask all applicants if there are any accessibility accommodations that are needed during the recruitment process.

#### *Offering a Job to a Successful Applicant*

When offering a job to successful applicants, HMECU will inform them of our policies on accommodating employees with disabilities.

*Please refer to the Accessible Recruitment, Selection and Hiring Processes, located in the Human Resources Policy for more details.*

### **3.2.4 Accessible Formats and Communications Support**

New employees may request accessible formats and communication supports. Accessible formats and communication supports may be requested for information required for the employee to perform their job and information that is generally available to all employees. HMECU will consult with employees to determine their accessibility needs and how best to accommodate them as needed. See section 3.1.2 for a list of accessible formats and communications supports provided by HMECU.

### **3.2.5 Documenting Individual Accommodation Plans**

#### **Definition**

“Accommodation” an adaptation or adjustment made to enable a person with a disability to perform the essential duties or requirements of the position. The requirement, qualification or factor must be reasonable and bona fide in the circumstances. Examples of accommodation include:

- Workstation and/or minor office modifications
- Temporary alternative work
- Flexible or alternative work schedules



- Temporary rehabilitative assignments (return to work)
- Temporary relocated from an area where environmental sensitivity resulting in illness that is medically supported prevents performance of essential duties.

### *Documenting Individual Accommodation Plans*

HMECU will develop individual accommodation plans for employees with disabilities when the employee is not under the Return to Work Plan provided by our **insurer**. An employee has the right to request an accommodation if they need it to perform their job or to access organizational information, such as policies or procedures. The individual accommodation plan will establish a formal way of recording and reviewing the workplace-related accommodations that will be provided to an employee with a disability. HMECU will work with the employee with a disability to find the appropriate accommodation to meet the individual's accommodation needs. For example, HMECU will provide screen reader software for a computer to an employee with a visual impairment. See Appendix C for Individual Accommodation Processes and Plan Templates.

### **3.2.6 Workplace Emergency Response Information**

The purpose of the individualized emergency response information is to help both employees with disabilities and HMECU be better prepared for a range of emergencies such as fire or power outages. The workplace emergency response information will help for example an employee who cannot hear a fire alarm be able to exit the building safely. HMECU is dedicated to ensuring that employees with disabilities are provided with a plan when needed. Employees are responsible for informing the VP of Human Resources that there is a need. With the employee's consent, HMECU will ensure the information is shared with anyone designated to help that employee in an emergency.

Information will be reviewed when the employee moves to a different location within the organization, the employee's overall accommodation needs or plan are reviewed and if HMECU reviews its emergency response policies.

### **3.2.7 Performance Management, Career Development and Redeployment**

#### **Definitions**

“Performance Management” is activities related to assessing and improving employee performance, productivity and effectiveness, with the goal of facilitating employee success.

“Career Development” is providing additional responsibilities within an employee's current position and the movement of an employee from one job to another in an organization that may be higher in pay, provide greater responsibility or be at a higher level in the organization or any combination of them and, for both additional responsibilities and employee movement, is usually based on merit or seniority, or a combination of them.

“Redeployment” is the reassignment of employees to other departments or jobs within the organization as an alternative to layoff, when a particular job or department has been eliminated by the organization.

### **Standard**

HMECU will take into account the accessibility needs of employees with disabilities and their individual accommodation plans in accordance to performance management, career development and redeployment. For example, if an employee requires larger font on their performance appraisals, that would be accommodated.

### **3.2.8 Return to Work Processes**

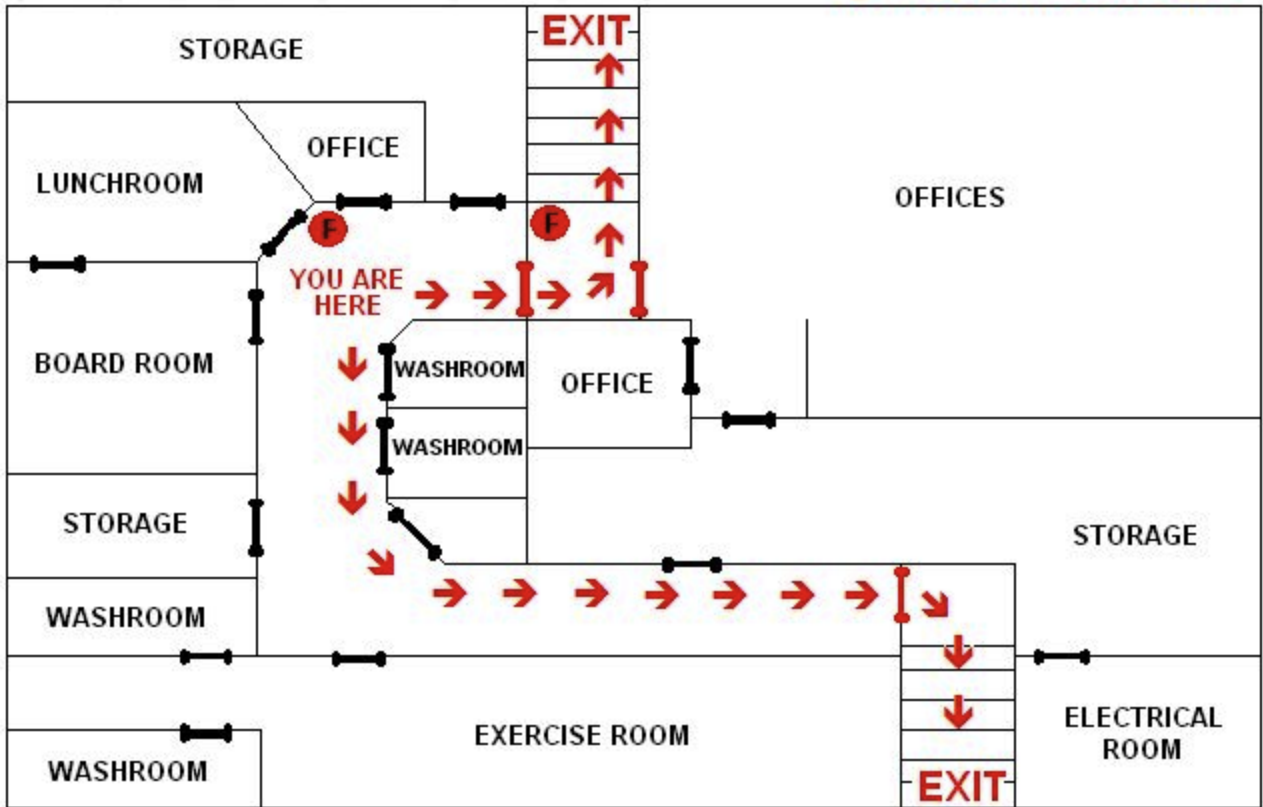
HMECU recognizes that an employee with a disability may sometimes need to take time off work for treatment, recovery or other reasons. In addition, a disability such as an injury or illness can happen at any time and to any employee. The standard requires that HMECU develop a process that supports employees who have been absent due to a disability and require disability-related accommodations when they return to work. HMECU will work in accordance with the **insurer** for all employees return to work processes.





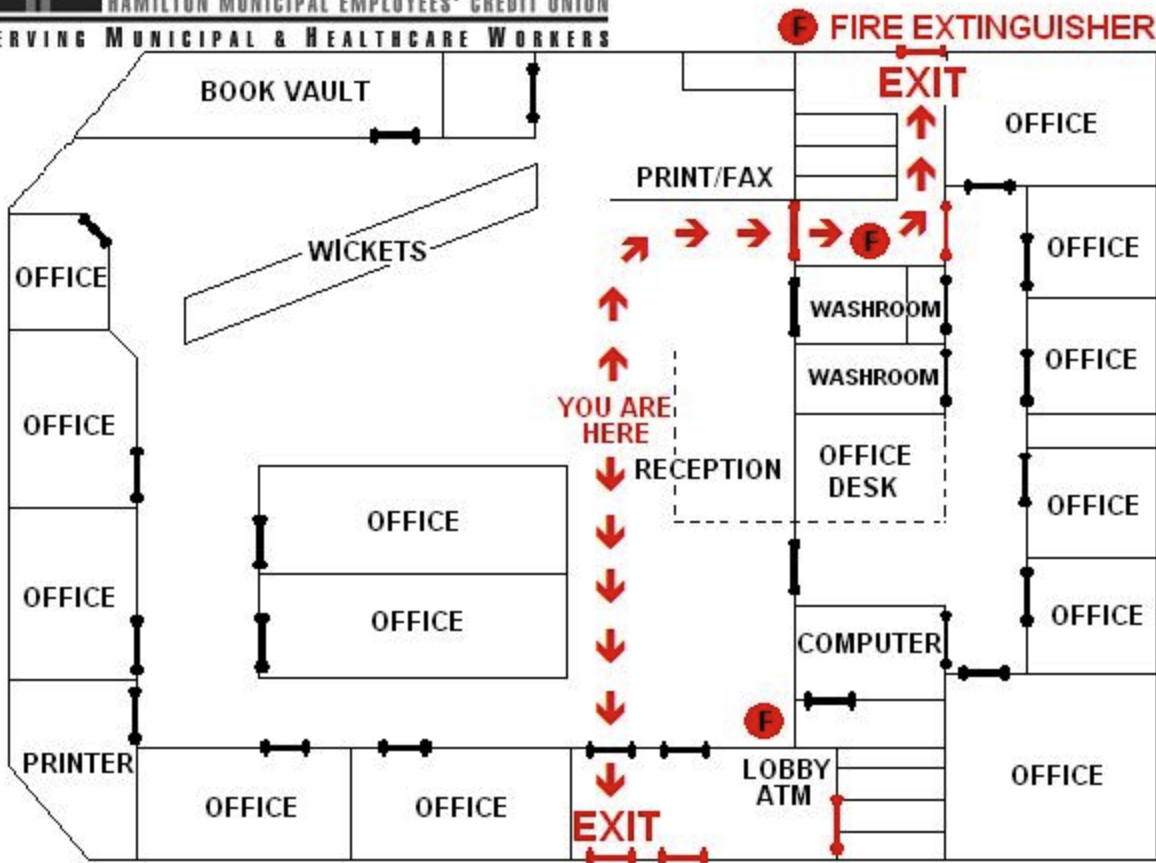
# BASEMENT

**F** FIRE EXTINGUISHER

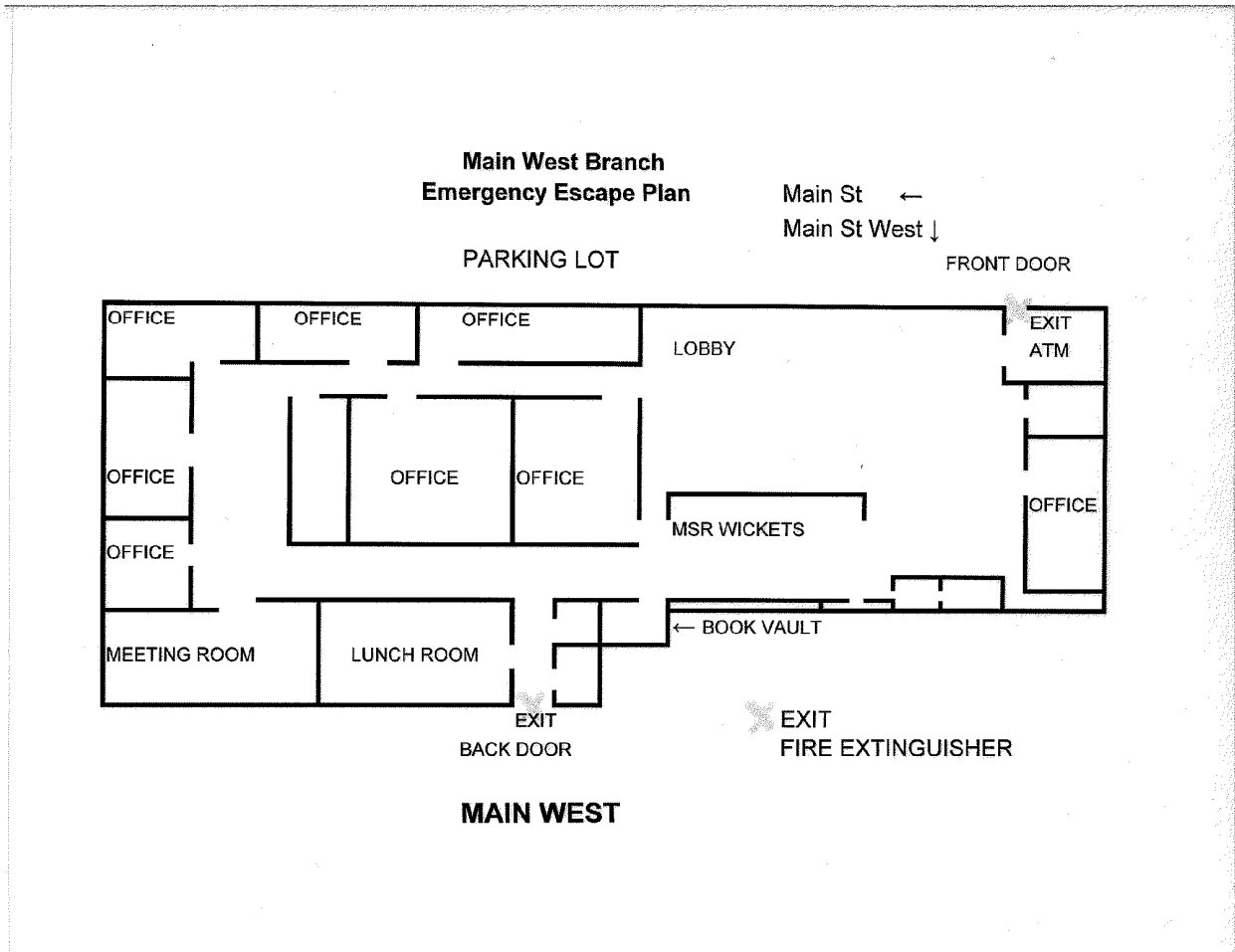




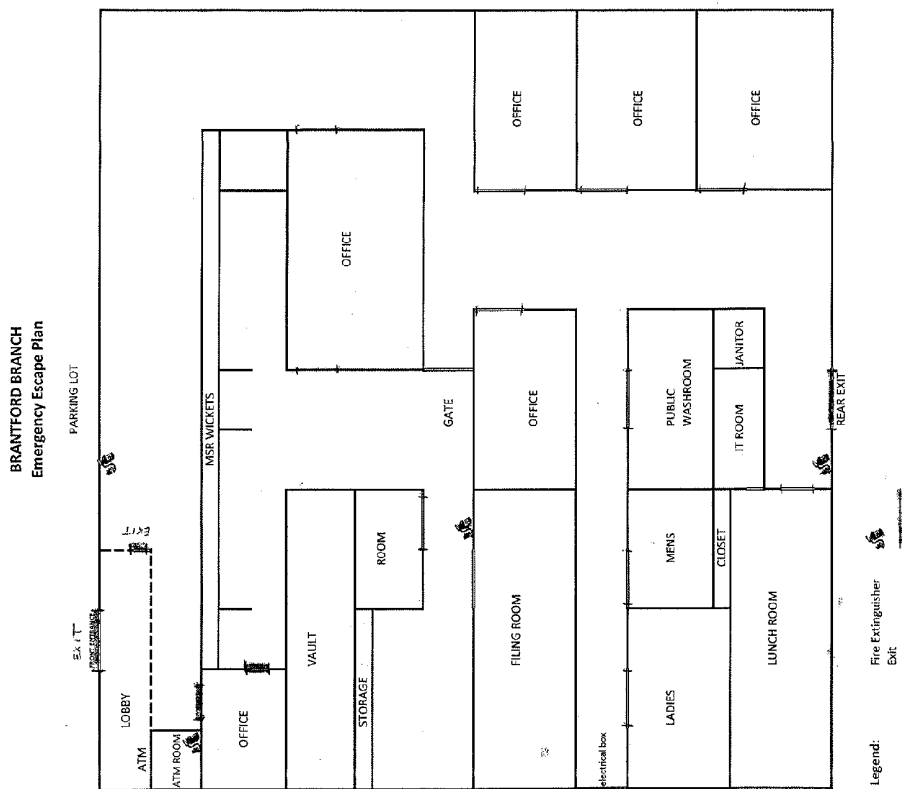
# MAIN FLOOR



**Main West:**



**Brantford:**



## Appendix B

### Emergency Evacuation Checklist

Action	Completed	Name
Retrieve the Visitor Registration Log, First Aid Kit, Disaster Recovery binder and Emergency Contacts list. Remove yourself, other employees and visitors from the building. *If the weather permits please ensure that you and the other employees have their coats.		
Evacuate premises and ensure that you are encouraging calmness to the individuals around you.		
Secure the building by locking the doors when everyone is out.		
Meet at the designated assembly point.		
Contact the emergency response units		
Account for all employees on duty and any visitors that were registered in the <i>Visitor Registration Log at the location</i> .		
If required the Certified CPR/First Aid Representative should administer first aid until the emergency medical personnel arrive.		
Greet the emergency response units.		
Follow any instructions the emergency response units give.		
Report anyone that may be still in the building if they are unaccounted for to the emergency response personnel.		
Contact the VP of Human Resources ( <a href="tel:905-526-7244">905-526-7244 Ext. 12</a> or Cell: <a href="tel:905-512-2933">905-512-2933</a> ). The VP of Human Resources will contact the appropriate members of senior management and the Health Cares Committee.		
Do not re-enter the building until authorized by emergency services personnel and/or the Senior Management Team.		



## **Appendix C**

### **HMECU's Accommodation Process**

HMECU is committed to providing accommodations for persons with disabilities. When an employee with a disability requests an accommodation, the following process will be followed

#### 1. Recognize the Need for Accommodation

The need for accommodation can be:

- Requested by the employee through their supervisor or through the VP of Human Resources
- Identified by the employee's supervisor, manager or VP of Human Resources

#### 2. Gather Relevant Information and Assess Needs

The employee is an active participant in this step:

- HMECU does not require details on the nature of the employee's disability to provide an accommodation; we need to know only about the employee's functional abilities
- The VP of Human Resources may ask for a functional capacity assessment at the company's expense
- The employee and the VP of Human Resources will evaluate the potential options to find the most appropriate measure
- An external expert may be involved, at HMECU's expense
- The employee can request the participation of a union representative or if the employee is from a non-union branch the employee can request a representative from the workplace.

#### 3. Write a Formal, Individual Accommodation Plan

Once the appropriate accommodation has been identified, the accommodation details are completed in a formal plan, including:

- Accessible formats and communication supports, if requested
- Workplace emergency response information, if required
- Any other accommodation that is to be provided

The accommodation plan is provided to the employee in a format that takes into account the accessibility needs due to disability, and

- The employee's personal information is protected at all times
- If the accommodation plan is denied, the manager will provide the employee the reason for the denial, in an accessible format

#### 4. Implement, Monitor and Review

The employee and manager monitor the accommodation to ensure that it has effectively resolved the challenges:

- Formal reviews will be conducted at a predetermined frequency
- The accommodation plan will be reviewed if the employee's work location or position changes
- The plan will be reviewed if the nature of the employee's disability changes

If the accommodation plan is no longer required, the employee and the VP of Human Resources will work together to gather relevant information and reassess the employee's needs, as required, in order for the employer to find the best accommodation measure (see step 2 above).

**Individual Accommodation Plan**

Employee's Name: \_\_\_\_\_ Date: \_\_\_\_\_

Employee's Title/Department: \_\_\_\_\_  
 \_\_\_\_\_

Manager: \_\_\_\_\_

Limitations	Job-related tasks/activities affected by limitations	Is this an essential job requirement?

Sources of expert input into the individual accommodation plan, if any (ie. Human Resources, Family Doctor, Specialists):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Accommodation measures are to be implemented from \_\_\_\_\_(Month/Day/Year) to \_\_\_\_\_(Month/Day/Year). (If no end date is expected, the next review of this accommodation plan will occur on \_\_\_\_\_ (Month/Day/Year).

Which job requirements and related tasks require accommodation?	What are the objectives of the accommodation (ie. What must the accommodation do to be successful)?	What accommodation strategies/tools have been selected to facilitate this task/activity?

**Roles and Responsibilities**

Outstanding Actions to	Assigned to	Due Date

Implement Accommodation		

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Manager's Signature