

## Employer Digital User Guide

### Welcome to the Health and Safety Excellence program

#### Setup your profile

1. Obtain the registration link from your WSIB-approved Health and Safety Excellence program provider. Use the Google Chrome internet browser to access the link for the best experience.
2. To setup your employer profile, the following information is required: WSIB account number, employer legal name, your first and last name, and your email address. Enter the information into the appropriate boxes on the 'Create New Account' page.
3. The system will send a verification email to the email address you provided.
4. Click on the link within the email received. Clicking on the link will take you to a 'Set Password' page.
5. Create and remember your password. Click on the 'Login' button.
6. You are now in the system. The first page you will see displays your company name with four buttons: 'View', 'Edit', 'Dashboard' and 'Email Notifications'.

#### Complete the health and safety assessment

The owner, senior manager, or person responsible for health and safety in your company should complete the assessment. This should take about 10-15 minutes.

1. Click on the 'Dashboard' button then the 'Assessment' button.
2. Answer the questions on the assessment by clicking on the available answer options.
3. Click on 'Save Draft' button if you are unable to complete in one sitting. The progress bar displays how close you are to completion.
4. Once you have answered all the questions, click on the 'Done' button. Based on your responses, a list of recommended health and safety topics will display on the next screen.

#### Complete your action plan

Click on the 'Dashboard' button then the 'Select action plan topics' button. Your business name and program provider will be pre-populated for you.

##### **Scoping**

- This option only applies to employers with a single WSIB account number with multiple locations or lines of business. Select if you will be scoping your action plan which is defined as implementing one or more of your topics to less than 100% of your locations or lines of business.
- If you select the scoping option, you also need to enter the scoping %. To calculate the percentage, divide the payroll impacted by scope (total payroll of locations or lines of business where the action plan topics will be implemented) by the total account payroll of the WSIB account number registered in the program.
- Financial recognition will be based on the scope of implementation – your provider can give you more detailed information on this option.

##### **Selecting action plan topics**

- The level that you have been placed in (based on your assessment results) is noted with a star beside it as well as the recommended health and safety topics.
- Click on a topic name or arrow beside it to display the topic description and any topics that are suggested to complete prior to selecting the topic and/or other topics that are recommended to work on at the same time. Contact your provider if you have questions about the topics.
- Select a minimum of one to a maximum of five health and safety topics for your action plan:
- Click on the blue “-“symbol  to remove a topic from the 'Selected Topic(s)' section.

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- Click on the blank tick-boxes to select other topics. Once you click the topic, it will display in the 'Selected Topic(s)' section on the right side of the screen.

#### Topic selection document (optional)

- Check with your provider to see if they want you to upload a document to support topic selection.
- To upload a document, click on 'Choose File' button and provide a description of the document.

#### Save and submit action plan to provider

- Click on the 'Save' button if you are unable to complete in one sitting. The 'Change to' box at the bottom of the screen should display 'Draft' when you are saving a draft version and not yet ready to send to your program provider. You can go back into it at another time by clicking on the 'Dashboard' button and the 'View/edit action plan topics' button.
- You can add and save notes/comments by clicking on the 'View' button at the top of the screen – this brings you to the action plan page. Type your notes/comments into the 'Add new comment' section at the bottom of the screen. For example, comments may include discussion summaries between you and your provider as well as your rationale for the selection of health and safety topics. To return to the previous screen, click the back arrow at the top of the page.
- Once you are satisfied with your health and safety topics, have completed the scoping section (if applicable) and uploaded your optional topic selection document, scroll down to the 'Change to' box at the bottom of the screen and select 'Ready for review'.
- Click on the 'Save' button. You will receive a confirmation message that your action plan has been updated. Your Provider will receive a notification to review and approve your action plan.

### Culture survey (optional)

We encourage you and other employees from your business to complete the survey. It should take less than 5 minutes to complete.

1. Click on the 'Dashboard' button then the 'Culture survey' button.
2. Copy the entire link on your browser's address bar at the top (or click on the 'Culture survey link' button on the previous screen).
3. Using your own email application (such as 'Microsoft Outlook', 'Gmail', etc.), open a new email message and paste the link in the body of the email. Add an introduction message encouraging employees to complete the survey. It is anonymous and does not track or collect personal identifiers.
4. Send the email to your employees (or a representative group of employees) across your organization.
5. Once employees click on the link you sent, they will only see the survey screen and be able to complete the survey without having to log into the system. They will receive their score and a corresponding legend similar to below:

#### Legend

- $\geq 3.0$  - Optimize
- 2.0-2.9 - Improve
- $\leq 1.9$  - Need help

6. Their results will also summarize automatically and will be viewable only to you under your 'Dashboard' in the 'Culture Survey' table. The number at the far right top of the table is the number of employees from your business who have completed the survey.
7. While you can ask employees to retake the survey at any time, we recommend that you do so once a year to track the progress of your health and safety journey.

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#### Implementation model, evidence story, evidence files and topic submission for validation

To navigate to the section where you select your implementation model, explain the work you have completed and upload evidence files to support the topic requirements click on the 'Evidence story' button from your dashboard then click the 'Edit' button. A process bar will appear along the top of the screen with the following sections:

1. **Topic Selection:** View the list of your approved action plan topic(s) by clicking on 'Topic selection' in the process bar along the top of the screen. Your selected topic(s) are displayed in a table on the right side of the screen. The scoping flag (and scoping percentage if you are scoping) are also displayed on this page as well as the 'Topic selection document' if uploaded. You cannot edit anything on this page.
2. **Implementation Model:** Select the model you will use to implement your topic(s) by clicking on 'Implementation model' in the process bar along the top of the screen:
  - a. Select either WSIB's "Five Steps to Managing Health and Safety", "Plan-Do-Check-Act" or another model approved by your provider. **Please note that once you select a model, it cannot be changed until the next program year.** Please ensure you discuss with your provider the model that best fits your needs before making your selection
  - b. If you have selected 'other provider-approved model' you must upload a 'topic implementation document' with your evidence story. If you have selected 5 steps or plan-do-check-act, it is optional. Click on 'Choose File' and then provide a description of the document. To view the 'topic implementation document' after it has been uploaded, click on the file name (hyperlinked in blue text); you cannot view the file by double clicking on the file name. The file is now downloaded and will appear at the bottom of your screen. Select the 'Save and continue' button at the bottom of the screen.
3. **Evidence story:** If you have selected WSIB's "Five Steps to Managing Health and Safety" or "Plan-Do-Check-Act" as your implementation model, explain how you made your topic(s) "living and breathing" in the workplace in this section. Click on 'Edit' beside each topic to provide your detailed narrative. If you have selected 'another provided approved model' in the step above, upload your evidence story for your topic(s) in the 'topic implementation document section' (bullet (b) above) of the 'Implementation model' page or include it as one of your evidence files.
4. **Evidence upload:**
  - a. **Add evidence:** Click on the 'Edit' button to the right of the topic name and then click on 'Choose Evidence' button under 'Upload evidence files'. You can either:
    - i. **Upload new evidence file:** Provide a name for the evidence you would like to submit. Click on 'Choose File' to find and select the evidence file (double click on the file name) you would like to upload from your computer, mobile device or tablet noting the accepted file size limit and file types. Provide a brief description of the file. Click on the 'Add new evidence' button then click on the 'Use selected' button at the bottom of the pop-up box. Click on the 'update evidence' button and then click on the 'save' button at the bottom of your screen.
    - ii. **Browse existing evidence (evidence files you have already uploaded for another topic):** Click on 'Browse existing evidence' to select evidence files you have already uploaded to support the completion of another topic. Icons of the file names already uploaded will appear. Select the files you would like to use by clicking within the box above the file name. A green checkmark will appear. Click on the 'Select evidence' button then click on the 'Use selected' button at the bottom of the pop-up box. Click on the 'update evidence' button and then click on the 'save' button at the bottom of your screen.

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1. **Submit evidence to Provider:** Once your evidence story and evidence files are ready for the provider to review and submit to the WSIB for validation, you need to click the edit button beside the topic name and check the box titled 'Submit to provider for review'. Click on the blue 'Update evidence' button and select the 'Save' button. You will be taken to an 'Evidence Confirmation' page to review before completing your submission to your provider. On the 'Evidence confirmation' page check that you are submitting the correct topic and evidence files and click on 'submit'.

#### b. Topic status (displayed to the right of the topic name on the 'Evidence Upload' page):

- **Draft:** Topic is being worked on by the employer and is not ready for the Provider to review.
- **Ready for provider review:** Evidence story and file(s) have been submitted to the Provider for their review before they submit the topic to the WSIB for validation.
- **In progress:** Evidence story and file(s) have been submitted to the WSIB for validation.
- **Complete:** The WSIB Validator has completed their desk validation of the topic and the employers evidence is sufficient or strong to support the topic requirements and demonstrates the topic is 'living and breathing' at their workplace.
- **Incomplete:** The WSIB Validator has completed their desk validation of the topic and the employers evidence is insufficient or limited to support the topic requirements and does not demonstrate the topic is 'living and breathing' at their workplace.
- **Additional evidence required:** The WSIB Validator requires additional evidence because the employers evidence is insufficient or limited to support the topic requirements and does not demonstrate the topic is 'living and breathing' at their workplace.

### Defer a Topic

You may choose to defer a topic to a future program year.

2. Click on 'Evidence upload' from your Dashboard
3. Select the topic(s) you wish to defer and click on the 'Edit' button beside the topic name
4. Check the box beside the verbiage 'Defer Topic'
5. A text box will appear for you to note the reason why you are deferring the topic
6. Click on the 'Update Evidence' button and then the 'Save' button at the bottom of your screen
7. You will be taken to an 'Evidence Confirmation' page to review before completing your submission to your provider
8. If you are sure you want to defer the topic click on the 'Submit' button.
9. You will notice that the status beside the topic name is now 'Deferred'

Note: Once you defer a topic, you cannot submit the topic for validation as a current action plan topic.

### Submitting Additional Evidence to the WSIB Validator

If you receive notification from the WSIB Validator that additional evidence is required to complete your topic, the new evidence must be submitted by your provider on your behalf to the WSIB within 60-calendar days. Check with your provider on the date they require you to upload your revised evidence to meet this deadline.

You will notice that the status for the topic that requires additional evidence has reverted to back to 'Draft' with the verbiage 'additional evidence required' beside the topic name. Click on the 'Edit' button to the right of the topic name and you will see the reason the validator is asking for additional evidence.

1. You can upload a new or existing evidence file (if you have room to do so). If you submitted 5 evidence files already, then you must remove one of your files before you can upload a new file or use another existing file.
  - a. **Upload new file:** See 4)a)i) under the section above titled '[Upload new evidence file.](#)
  - b. **Replace an existing file:** Click on 'Remove'. You will then need to make the necessary revisions to the relevant evidence file that you have saved, save the edited version and upload again.

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2. Ensure that the evidence description clearly describes the new file or the replaced file as it pertains to the additional information you are providing to the WSIB Validator.
3. Submit to your Provider once the new evidence file(s) are ready for your provider to review and submit to the WSIB for validation. To do this, change the 'Evidence Status' from 'Draft' to 'Ready for Provider Review'. Click on the drop down arrow in the evidence status box and select 'Ready for Provider Review'. Scroll to the bottom of the screen and select the 'Save' button.

### Email Notifications

The default setting to receive email notifications of information from your provider and the WSIB is 'Subscribe'. If you wish to unsubscribe from these notifications, click on 'Dashboard' on the top of your screen and then the 'Email Notifications' button. Click on 'Unsubscribe' under 'Email Notification Settings' then click 'Save'.

### Add New Employer Representation

If you are acting on behalf of multiple firms registered in the program with different account numbers, please complete the following steps in order to toggle between the different accounts using a single email address:

#### a) To add employer representation at the time of registration into digital portal:

1. Obtain the registration link from your WSIB-approved Health and Safety Excellence program provider. Use the Google Chrome internet browser to access the link for the best experience.
2. To setup your employer profile, the following information is required: WSIB account number, employer legal name, your first and last name, and your email address. Enter the information into the appropriate boxes on the 'Create New Account' page.
3. The system will send a verification email to the email address you provided.
4. Click on the link within the email received. Clicking on the link will take you to a 'Set Password' page.
5. Create and remember your password. Click on the 'Login' button.
6. You are now in the system. The first page you will see displays your company name with four buttons: 'View', 'Edit', 'Dashboard' and 'Email Notifications'.
7. Click on 'Edit' and then click on 'Add new employer representation' at the bottom of the page.
8. Input the employer name and WSIB account number then click 'Create employer representation' then click 'Save'
9. At the top of your screen, you should see a 'Switch Employer' box at the top of your screen. Click on the drop down arrow in the box to select an employer. You can easily toggle back and forth between employers, to complete the Assessment, Action Plan and Evidence Story. If the 'Switch Employer' filter does not display, a Site Admin will receive an alert to look into this for you.

#### b) Users already registered in digital portal

1. Log into the system. The first page you will see displays your company name with four buttons: 'View', 'Edit', 'Dashboard' and 'Email Notifications'.
2. Click on 'Edit' and then click on 'Add new employer representation' at the bottom of the page.
3. Input the firm name and account number then click 'Create employer representation' then click 'Save'.
4. At the top of your screen, you should see a 'Switch Employer' box at the top of your screen. Click on the drop down arrow in the box to select an employer. You can easily toggle back and forth between employers, to complete the Assessment, Action Plan and Evidence Story. If the 'Switch Employer' filter does not display, a Site Admin will receive an alert to look into this for you.

### Multiple WSIB account numbers under one WSIB Organization ID (Coming soon...)

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Businesses may register with the WSIB under one legal entity (Organization ID) and have multiple WSIB accounts (account numbers). You may choose to enroll as an organization and complete one assessment and one action plan and have them apply across all WSIB account numbers or you may choose to have them apply across some WSIB account numbers.

**Thank you for participating in the Health and Safety Excellence program.**

**Questions?**

If you have any questions, please contact your Health and Safety Excellence program provider. If they are not able to assist you, they will contact the WSIB on your behalf.