Step 1: Join

Getting started in the Health and Safety Excellence program

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Introduction

Thank you for joining the Health and Safety Excellence program – you've taken an important step towards a healthier and safer workplace. Together, we're on a journey to make Ontario the safest place to work.

Now that you've joined, you may have questions about how the program works. We recommend that you read this document before you begin the program, because it includes tips and information to help you:

- Understand key program terms and requirements

- Set up your profile in the digital tool

- Learn where to go for additional support

While you're reading this guide, we recommend that you log into the digital tool – throughout this document you'll find helpful links to other guides and topic descriptions. Anytime you find a word or phrase that is underlined, it will hyperlink you to a definition or an FAQ within this document, another document.

About the Health and Safety Excellence program

The Health and Safety Excellence program is a voluntary incentive program that rewards businesses for investing in health and safety. By completing program topics, you'll help keep your workplace safer, and contribute to a stronger health and safety culture.

The program provides you with a clear roadmap to improve health and safety in your workplace, whether you're just getting started or want to address gaps in the systems and processes you already have in place. We launched the Health and Safety Excellence program in November 2019, at the same time as the Ministry of Labour, Training and Skills Development's Supporting Ontario's Safe Employers (SOSE) accreditation program. If you want to work towards SOSE accreditation, the Health and Safety Excellence program can help.

The program gives you a chance to focus on the health and safety issues that matter most to you. There are 36 health and safety topics available to choose from in each of the three (3) levels:

Program levels
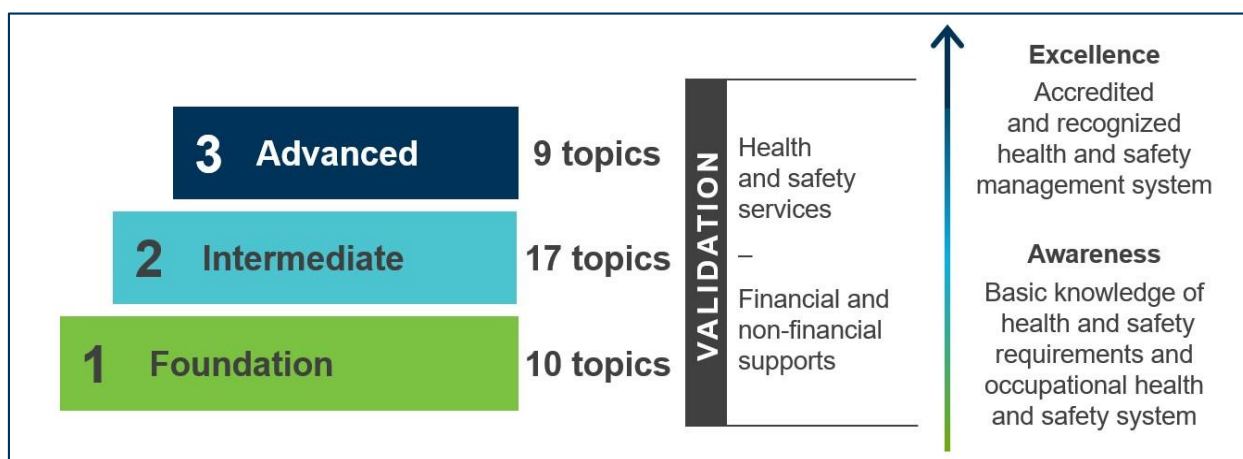
Level 1: Foundation (10 topics available)
- You're forming the foundation

Level 2: Intermediate (17 topics available)
- You're building and customizing

Level 3: Advanced (9 topics available)
- You're integrating and optimizing

We've built an online, digital tool to help make it easier for you to manage your progress through the program. The digital tool is home to our program guides, reference documents and other useful resources, and it's available 24/7 so you can access it from anywhere at anytime.

Your journey through the program

There are four key steps in the program: Join, Develop, Demonstrate, and Achieve, and we've developed a guide for each of the steps. You're currently reading the **Join** guide. Click on any of the titles below to access the other guides.

Step 1: Join
- Register with an approved program provider.
- Complete your health and safety assessment and culture survey, and select health and safety topics for your action plan.

Step 2: Develop
- Develop and implement your chosen action plan topics in your daily work activities.

Step 3: Demonstrate
- Show us how your topics have been implemented, and how they're living and breathing in your workplace.
- The WSIB will validate your topics to ensure they meet program requirements.

Step 4: Achieve
- Receive:
  - A rebate on your WSIB premiums
  - An achievement report
  - Badges for completing program levels

Rebates

Through the program, you'll receive financial rebates on your WSIB premiums[1] in recognition of your efforts to complete health and safety topics. The size of the rebates we send out will vary from business to business. The minimum rebate for each topic is $1,000 and the maximum is $50,000 (or up to 100 per cent of the amount a business paid for their prior year's WSIB premiums).

To calculate your rebate, talk to your provider.

Support for smaller businesses

Smaller businesses (1-99 employees) will receive double the rebates for every validated program topic they complete up until December 31, 2022. Speak to your program provider to learn more.

[1] Schedule 1 businesses only

Badges

More than ever, job seekers, employees and customers want to make sure that the companies they do business with are healthy and safe. Through the program, you can earn badges to showcase your organization's commitment to health and safety. You can use your badges in a number of ways – feel free to check out our Terms of Use.

> **Tip**: Consider using your badges on your company's website, email and/or letterhead. You can also print the badge and display it in your storefront, on vehicles or any other spot that would help you showcase your health and safety commitment.

Member badges

When you join the program, and once your first action plan is approved, you'll receive a member badge. People can also see your member badge on the WSIB's online Safety Check, which is used by job seekers and consumers to find information about businesses' health and safety data.

Level badges

As you progress through the program, you'll earn level badges – Foundation, Intermediate and Advanced – when you successfully complete all topics within the program level.

> **Note:** You may have already completed some topics before you started the program – if your business has previously implemented all of the topics within a program level and meets the WSIB requirements for those topics, you may request a level badge for the work you completed before joining the program.

See the FAQ for more information.

Eligibility for rebates and badges

Once you've completed the topics in your action plan, you'll be eligible to receive your rebate and possibly a new badge, if your business meets these criteria:

Member badge
- Be a Schedule 1 or Schedule 2 business registered in the program.
- Have an **approved** action plan.
- If a business is waiting on a decision regarding a workplace fatality claim, they're not eligible for a badge until a decision about that fatality is made.

Rebate
- Be a Schedule 1 business (you're covered by the WSIB and you pay premiums based on your insurable earnings).

- Have one or more action plan topics validated as **complete.**
- Comply with the Workplace Safety and Insurance Act (WSIA).
- Have no allowed traumatic fatality claims from the date your action plan was approved to the date the rebate is issued.
- If a business is waiting on a decision regarding a workplace fatality claim, they're not eligible for a rebate until a decision about that fatality is made.

Level badge

- Be a Schedule 1 or Schedule 2 business registered in the program
- Have previously completed at least one successful action plan
- Comply with the Workplace Safety and Insurance Act (WSIA)
- Have no allowed traumatic fatality claims from the date your action plan was approved to the date the rebate is issued.
- Complete all topics within the level.
- If a business is waiting on a decision regarding a workplace fatality claim, they're not eligible for a badge until a decision about that fatality is made.
- Once a member earns a level badge their future action plans can't include a Foundation-level topic (except for repeating the Control of Hazards topic).
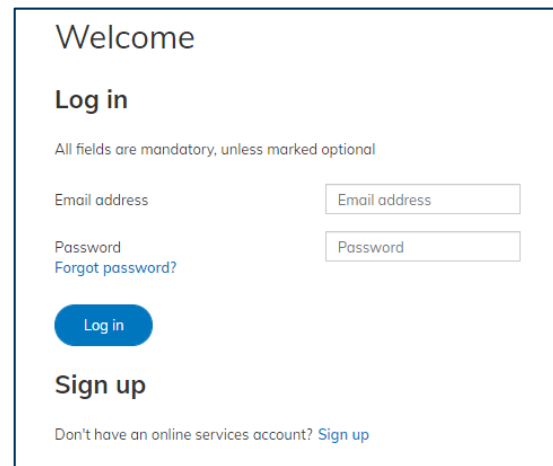
Note: When we're determining whether your business is eligible for a rebate or a badge, the severity and frequency of any non-compliance issues may influence this decision.

Getting started with the digital tool

Your log in and profile

To get started, you'll need a WSIB online services account and a profile in our digital tool.

1. Follow the link provided by your program provider, which will direct you to the WSIB's online services page.

2. If you already have an online services account, log in with your email and password. You will be taken to step seven to complete the registration form.

3. Click the **Sign up** link if you need a new online services account. This process will only be required the first time you sign up.

4. Enter your email address on the next screen and click on the **Get a verification code** button.

5. Copy the verification code from your email, and paste it in the **Email verification code** window. Click on the **Verify code** button.

6. Once your code is verified, choose a password and click the **Create** button.

7. On the employer representative registration form, input your name, WSIB account number, business name and contact information, and click **Save** on the next screen.

Your profile is now complete, and the page will display your company name with five buttons along the top: **View**, **Edit**, **Dashboard**, **Notifications**, and **Email Notifications**.

Tip: The next time you visit wsib.ca, click on the **Log in** button at the top of the page, and you'll be navigated to the business home page. Click the **Go** button next to "Access health and safety programs" to access the digital tool.

Notification preferences

There are two types of notifications in the digital tool – dashboard and email – that we use to send you notifications about key activities that require your attention.

You're automatically set to receive email notifications, but if you'd like to turn email notifications off:

1. Click **Dashboard** at the top of your screen. Select **Email Notifications**.

2. Under settings, click **Unsubscribe**.

3. Click **Save**.
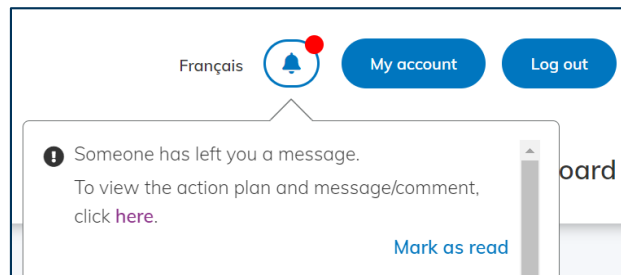
You'll see a blue bell button at the top of the **Dashboard** screen – a red dot will appear beside the bell when you receive a dashboard message.

Once you've read the notification, the red dot will disappear, and notifications older than 30 days will be automatically deleted.

Download your member badge

You'll be able to download your member badge once your [action plan has been approved by your provider](#).

To access your member badge go to your dashboard, scroll down to the **Badges earned** table. Click the **Download badge** button.

The health and safety assessment

There are 36 topics for you to choose from to enhance the health and safety of your business. To help you select suitable topics for your business, you'll need to complete a simple health and safety assessment. The assessment should be completed by your company's owners/operators and those involved in the health and safety of your workplace. It shouldn't take any more than 15 minutes to complete, but if you're unable to complete it in one session, you can save it and complete it later by clicking the **Save draft** button.

One assessment is required for each WSIB account registered in the program unless they share the same [organizational ID.](#) If you have multiple accounts under the same organizational

ID, you can choose to complete one assessment and apply the results to all related accounts. See the FAQ for more information.

To complete the assessment on the digital tool:

1. Click the **Dashboard** button.

2. Click the **Assessment** button.
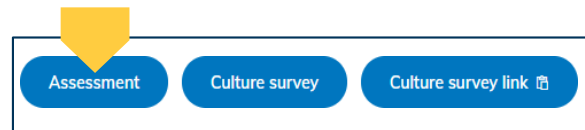
3. Once you've answered all the questions, click the **Done** button.

The assessment results will indicate a Foundation, Intermediate, or Advanced program level and a list of recommended topics for you to consider (look for the star beside the topic names). However, you're not limited to the recommended topics; you can select any of the 36 topics based on the needs of your business. See Categories for topic selection and Selecting your health and safety topics sections below.

The health and safety culture survey

The WSIB's health and safety culture survey is another resource to help you identify program topics you may want to work on – it helps you asses how your employees feel about the health and safety practices in your business. The survey is an optional and anonymous 13-question survey.

To complete the culture survey while logged into the digital tool:

1. Click the **Dashboard** button.

2. Click the **Culture survey** button.

To share the survey with your employees:

1. Log into the digital tool.

2. Click on the **Dashboard** button.

3. Click the **Culture survey link** button.

4. Paste the link in the body of an email and send it to all your employees (or a representative group of employees). When an employee clicks on the link, they will be able to complete the survey.

Please refer to our **Culture Survey Guide** for more information on the survey benefits and how to interpret your score.

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Choosing topics

Now that you're familiar with the digital tool, your next step is to figure out what topics you'd like to include in your action plan. We've also included some helpful information below and in the FAQs.

Selecting health and safety topics

Choosing the most appropriate topics requires planning. You'll want to think about your current health and safety program and how you might build on it. Your health and safety assessment results will help, and you can look at your injury record online on Compass, review inspection reports, employee feedback, internal audit assessments and other sources of information to understand where your health and safety program can be developed. Consider the following:

- What hazards are causing your employees to become injured or ill?
- Are parts of your health and safety program broken or not working as intended?
- Are you meeting legislative compliance requirements?
- Have you received any compliance assistance or orders from the Ministry of Labour, Training and Skills Development (MLTSD)?

Tip: You can review descriptions of each health and safety topic, topic requirements, and examples of topic submissions on the digital tool.

Categories for choosing topics
Once you've identified areas to build your health and safety program, you can select topics that will matter most to you. You'll need to select topics that are either:

- New initiatives for your business
- Related to efforts that you've made in the past that aren't working well, and aren't improving health and safety the way you thought they would.

Important: Please make sure you review the topic requirements when selecting topics. If you choose a topic that you've implemented in the past (categories 2 or 3 below), you **may** need to provide a rationale in the digital tool that explains why you want to repeat it. See below for more information on how to provide a rationale.

There are five categories of topic selection:
Categories 1, 3 and 5 are new health and safety initiative topics and categories 2 and 4 are previously implemented health and safety initiative topics.

1. A health and safety initiative that is **new** to your business.

2. A health and safety initiative that you previously implemented, but due to a **significant gap**, has not been effective in controlling risks.

3. A **significant change** in your workplace, such as adjusting your business model during the pandemic, where the change has led to risks not being controlled.

4. Addressing a hazard in your workplace that has not been previously controlled. In this case, you would select the Control of Hazards topic.

5. Re-selecting a previously selected topic that was not completed (i.e. on a previous action plan, you deferred the topic or it was deemed **incomplete** by the WSIB validator). To re-select a topic, it must meet topic selection requirements.

Please see the FAQs for more information, and speak with your program provider for additional guidance.

Ineligible for selection – continuous improvement

When thinking about choosing which topics to work on, it is important to note that topics that have already been implemented and are in a continuous improvement cycle are not eligible. Continuous improvement is the ongoing review and updating of policies, procedures or health and safety processes.

Selecting the Control of Hazards topic

We have one topic that you can select multiple times – the **Control of Hazards** topic. A hazard is a source of potential harm or adverse effect on something or someone. There are six categories of hazards: chemical, physical, ergonomics, psychosocial, biological and safety. Control measures are initiatives put in place by an organization to remove or reduce exposure to a hazard. Control measures include all activities needed to protect people at work from getting ill or injured from a specific hazard.

You can select this topic when you identify a new hazard, or when you need to control an existing hazard more effectively. However, when selecting the Control of Hazards topic, **you must identify the specific hazard(s) you plan to address in the comments section** of your action plan in the digital tool. The hazard you select should not be too narrow or isolated. For example, "falls related to icy walkways" could exclude other slippery surfaces. The hazard should be broader in scope so you can address the same hazard in multiple scenarios and/or locations.

> **Note:** The Control of Hazards topic is not intended to address all hazards in your workplace at once or help you to develop a generic hazard control program. Also, although it's not mandatory, we recommend that you complete the **Recognition of Hazards** and **Risk Assessment topics** before selecting the Control of Hazards topic.

If you'd like to select the **Control of Hazards** topic, your provider can work with you to help identify the specific hazard(s) you'd like to control. For examples of hazards that can be selected for the Control of Hazards topic, download or view the FAQs.

Creating an action plan

Once you've decided which topics you want to work on, you need to confirm your choices on the digital tool. The collection of topics you select for the year ahead is called your **action plan**.

Selecting your topics

To create your action plan, first confirm your topic choices:

1. Click the **Dashboard** button.

2. Click the **Select action plan topics** button.

3. You'll notice that the topic and level recommendations from your health and safety assessment are marked with a star. To see a description of the topic, click it or the drop-down menu beside it. On this screen you may also see information on topics that support each other – if you want to choose those topics, we recommend that you work on them at the same time.

4. Select between one (1) and five (5) topics from the drop-down list by checking the box beside it. Once you check the box, the topic is displayed in the box on the right titled **Selected Topic(s)**. If you need to remove a topic from your **Selected Topic(s)** list, click on the blue circle beside the topic you want to remove.
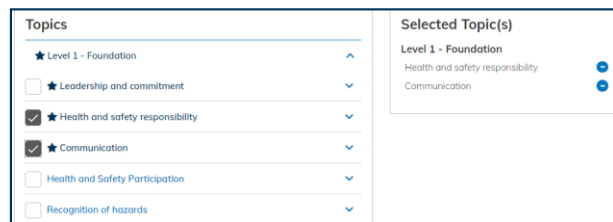
Scoping

While some businesses may have the resources to implement their action plan throughout their entire business, others won't. Businesses with multiple locations or lines of business can choose to implement their action plan across part, but not all, of their organization – this is called scoping. You may be interested in scoping your action plan if you don't think you'll be able to fully implement your chosen topics throughout your entire business.

If you've decided that you'll be implementing your action plan in less than 100 per cent of your lines of business, locations, or sites you'll need to indicate that you'll be scoping your action plan. To scope your action plan, click the **Scoping implementation** button and input the percentage of your payroll that will be impacted by the action plan (where the change will be made). Please see our FAQs for more information, and speak with your program provider for additional guidance.

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Providing a rationale for topics

If you've selected topics that you've implemented in the past, (categories 2 or 3 above), you must provide a rationale for re-selecting them that answers the following questions:

- Which [category](#) is your topic in?
- Why are you selecting the topic?
  - For Category 2: Explain why your existing initiative is not working. Include any data of the effectiveness gap and its significance to support your statements.
  - For Category 3: Explain the significant change in the workplace.
- How will developing the topic again make your workplace healthier and safer?
- What meaningful outcomes do you expect to achieve by working on this topic?

> **Tip:** Provide your rationale by either uploading a topic selection document in the digital tool or by providing a comment in your draft action plan. Check with your provider on which option to use.
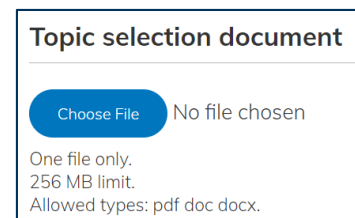
Uploading your rationale (if required)

To upload a rationale as a topic selection document:

1. Click the **Choose File** button under the Topic Selection document header.

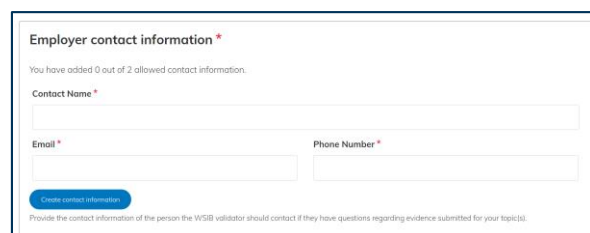   Provide a description of the document.

2. Follow the on-screen prompts to enter your contact information. Click the **Create contact information** button to save your contact information. This will make your information available to the WSIB team, as we may need to contact you while you're in the program.

Topic selection document

Choose File   No file chosen

One file only.
256 MB limit.
Allowed types: pdf doc docx.

Employer contact information *

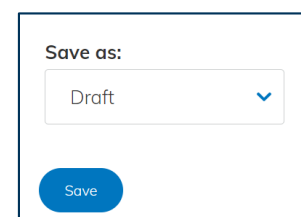You have added 0 out of 2 allowed contact information.

Contact Name *

Email *   Phone Number *

Create contact information

Provide the contact information of the person the WSIB validator should contact if they have questions regarding evidence submitted for your topic(s).

Saving your action plan as Draft

1. Click the blue **Save** button at the bottom of your page. The **Save as** box at the bottom of the screen should display **Draft** when you save a version not yet ready to send to your provider for approval.

2. If you want to go back into your **Draft** action plan, simply click on the **Dashboard** button and then the blue **View/edit** action plan topics button.

Save as:

Draft

Save

3. Once you've saved your draft action plan, you can add notes to help explain your topic selection. Comments are visible to everyone, including your program provider and the WSIB. In the **Action plan status** table, click the **View** button beside your **Draft** action plan to add notes or comments. For example, if you've chosen the Control of Hazards topic, this is where you would include the specific hazard you plan to work on.

4. Add your comments in the displayed field, and click the **Save** button under the table.

Saving your action plan as Ready for Review

1. To submit your **Draft** action plan to your provider for review, scroll down to the **Change to** box at the bottom of the screen and click the blue down arrow to change the status of your action plan from **Draft** to **Ready for review**. Click the **Save** button.

2. You'll receive a confirmation message at the top of your screen that shows the status of your action plan. This will change from **Draft** to **Ready for provider review**.
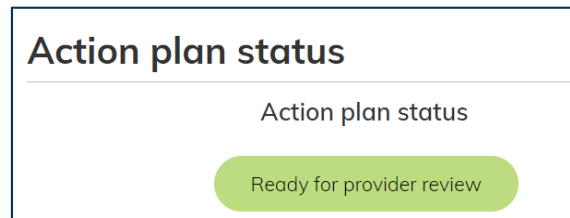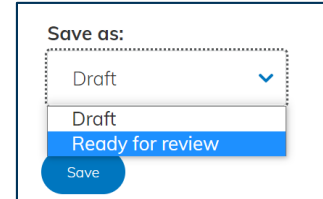
Once you've saved your draft action plan, your provider will be notified that it's ready for review. Your provider must approve your action plan within 90 calendar days, or it will expire. Once your action plan is approved by your provider:

- You'll receive an email telling you that it's approved (if you've chosen to leave your email notifications on)
- Your action plan status in the digital tool will change from **Ready for provider review** to **Approved**.

Note: If your provider doesn't approve your draft action plan within 90 days, your action plan status will change from **Draft** to **Draft expired**. If this happens, please contact your provider.

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Continuing your journey with Step 2: Develop

You're now ready to develop your chosen program topics and integrate them into your business. Your program provider will support you throughout this step. Please download and review our detailed **Step 2: Develop** guide for more information.

Additional information

If you'd like more support or information, speak to your program provider, or visit our FAQ page on the digital tool.