

# Health and Safety Excellence program

**Employer digital tool user guide**

## Contents

Access the program digital tool .....	2
How to access the digital tool the first time if you do not have a WSIB online services account .....	3
How to access the digital tool the first time if you have a WSIB online services account .....	7
Complete the health and safety assessment.....	9
Complete the safety culture survey.....	9
Select topics and create your action plan.....	10
Scoping.....	11
How to select action plan topics.....	11
Topic selection document.....	12
Employer contact information.....	12
Adding notes/comments to your action plan.....	13
Submit your action plan to provider for review and approval .....	13
Develop and demonstrate implementation of the topic.....	14
4 Step Evidence Story – Upload instructions.....	15
Topic selection .....	15
Implementation model .....	16
Evidence story.....	16
Evidence upload.....	18
Submit topic(s) to Provider to review and submit to the WSIB for validation .....	20
Receiving validation results from the WSIB.....	22
Additional evidence required to support topic implementation.....	23
Defer a topic.....	<b>Error! Bookmark not defined.</b>
2 Step Evidence Package – Upload instructions .....	24
Approved Topics .....	24
Evidence Package.....	25
Submit topic(s) to Provider to review and submit to the WSIB for validation .....	29
Receiving validation results from the WSIB.....	31
Additional evidence required to support topic implementation.....	32
Defer a topic.....	33
Action plan status .....	34
Topic status .....	35
Notifications (within digital tool) .....	35
Email notifications.....	35
Types of notifications.....	36

Employer achievement report ..... 36

Reconsideration of validation results ..... 36

Badges ..... 37

Resources ..... 37

Managing multiple WSIB account numbers with single email address..... 37

Multiple users for one WSIB account number..... 38

Multiple account numbers under the same organization ID..... 38

Topics and your next action plan – future action plan ..... 39

## Access the program digital tool

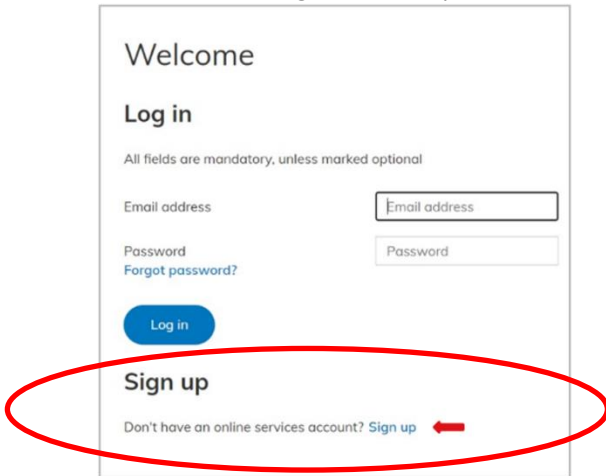
You will access digital tool through WSIB’s [online services](#). If you are not familiar with using online services, refer to the [online services FAQ](#).

If you are an employer rep and:

- Do **not** have a WSIB online service account, please follow the instructions at the top of the next page titled [“How to access the digital tool the first time if you do not have a WSIB online services account”](#)
- Have an online service account, skip to the section titled [“How to access the digital tool the first time if you have a WSIB online services account”](#)

## How to access the digital tool **the first time** if you do not have a WSIB online services account

1. Obtain your registration link from your WSIB-approved provider.
2. Once you have the registration link from your WSIB-approved provider, use Google Chrome internet browser to access the link. This link will bring you to online services page to sign up for an online services account.
3. Click on the “Sign up” link (shown below)



Welcome

**Log in**

All fields are mandatory, unless marked optional

Email address

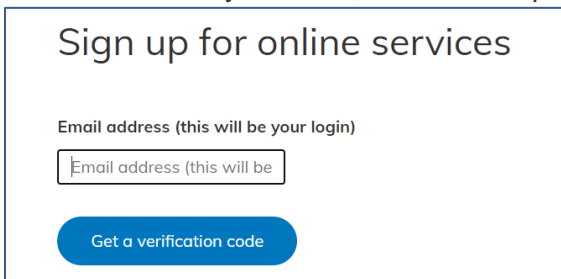
Password   
[Forgot password?](#)

**Log in**

**Sign up**

Don't have an online services account? [Sign up](#) ←

4. On the next screen, type in your email address, then click the “Get a verification code” button. We will send you an email with your code, which will expire after five (5) minutes.



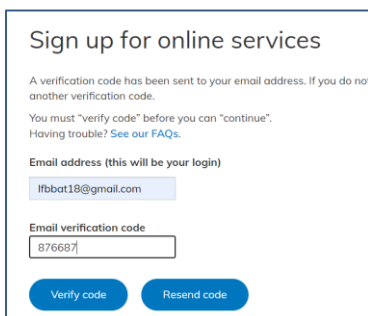
**Sign up for online services**

Email address (this will be your login)

**Get a verification code**

5. The site will link you to a new page – check your email for the verification code, and enter it into the “Email verification code” box, then click on the “Verify code” button.

**Please note:** if your code expires, please click the “Resend code” button



**Sign up for online services**

A verification code has been sent to your email address. If you do not see another verification code, you must “verify code” before you can “continue”.  
Having trouble? [See our FAQs.](#)

Email address (this will be your login)

Email verification code

**Verify code** **Resend code**

5. Once we verify your code, choose and enter your new password, check the box to show that you agree with the [terms of use](#) and then click the “Create” button.

Password  
  
 Re-enter password  
  
 By checking this box I acknowledge I have read the [terms of use](#) and agree to be bound by them.

6. You will now see the “Employer representative registration” form. To setup your HSEp account, you need your business name and WSIB account number. Enter the information into the appropriate boxes and click on “Create new account” button.

Employer Representative Registration

I am authorized to submit this registration on behalf of the legal entity (employer) named in this registration. I acknowledge that the information submitted in this registration is accurate and complete to the best of my knowledge and confirms the employer's enrollment into the Health and Safety Excellence program.

We authorize the Workplace Safety & Insurance Board (WSIB) to disclose to the Health and Safety Excellence program provider all financial information required for the administration of the program. This information would include information such as: premiums, classification, experience rating, claims frequency, and severity.

We authorize the WSIB and the Health and Safety Excellence program provider to store the information contained within for the purposes of administering the program.

Email \*

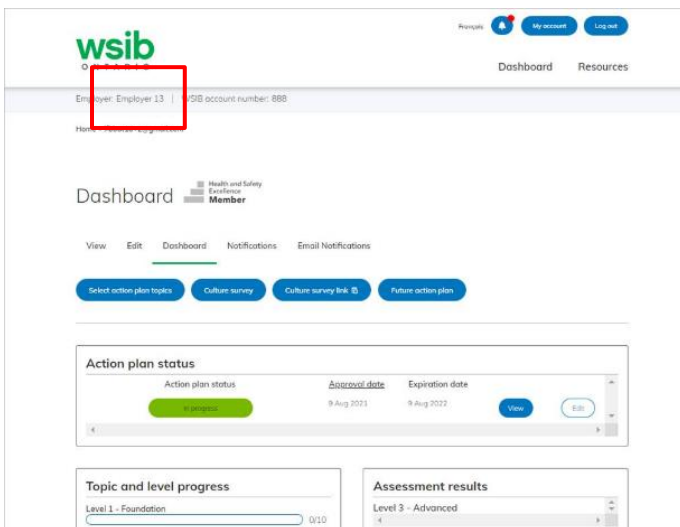
First name \*   
 Last name \*

Program provider

Employer name \*  
The employer name associated with your occupational health and safety management system (OHSMS).

Employer WSIB account number \*  
The WSIB account number (7 numerical digits) associated with your occupational health and safety management system (OHSMS).

7. The dashboard for your business will display.



8. When you click the ‘Log out’ button, you will be navigated to the online services log in page to complete your online profile. Fill in your email and password and click ‘Log in’.

wsib Online services  
ONTARIO

Welcome

Log in

All fields are mandatory, unless marked optional

Email address

Password

[Forgot password?](#)

[Log in](#)

9. On the next page, enter your name and contact information for your online services account profile and click “submit.”

wsib Online services  
ONTARIO

Francis Logout

Create profile

All fields are mandatory, unless marked optional  
You are now logged in. Please complete your profile information. Your online services profile will not be used to update existing account or claims contact information on file with the WSIB. If your information has changed please call 1-800-387-0750.

**Contact**

First name

Last name

We will contact you if there are problems with your online services information.

Daytime phone number (optional):  Ext:   Set daytime phone number as my preferred contact

Mobile (optional):   Set mobile phone number as my preferred contact

**We want to hear from you (optional)**

As we improve our online services, we'd like your feedback (optional)

Yes, you can contact me to participate in online consultations and surveys

Yes, please send me news and updates from the WSIB

You can unsubscribe at any time.

[Submit](#)

10. You will receive a confirmation message that your profile for your online services account has been created.

wsib Online services  
ONTARIO

Business home My profile Francis Logout

Hello, Employer test

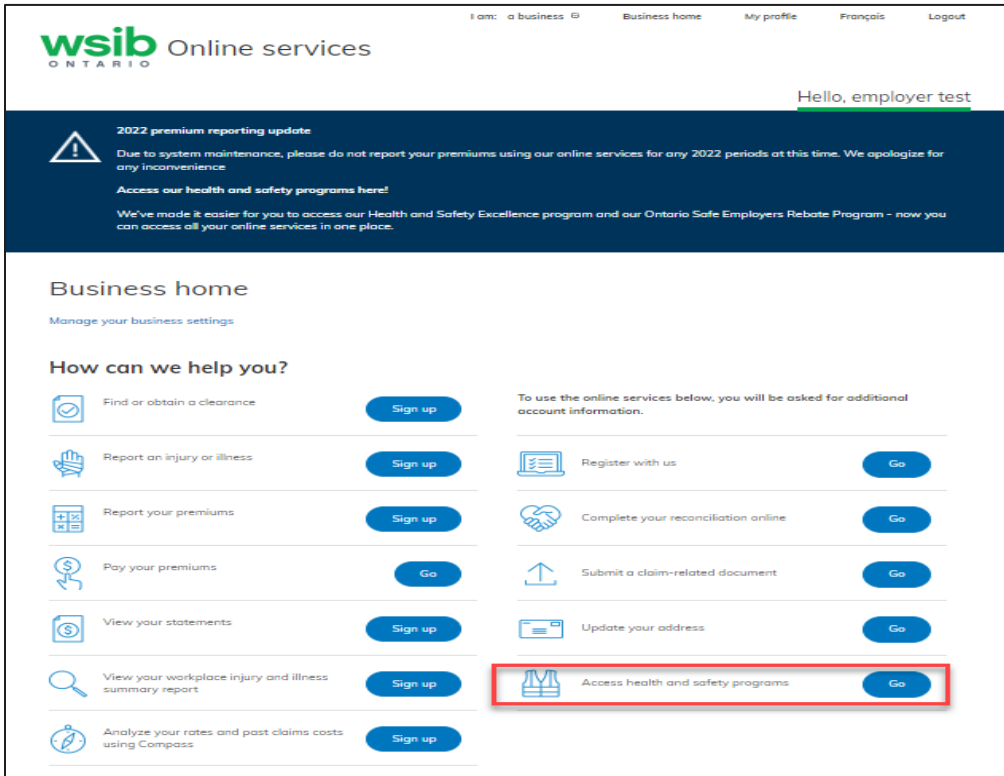
Create profile

**Confirmation**

Thank you for creating your profile. You can access our online services.

[Online services](#)

11. When you click the ‘Online services’ button, you will be navigated to the business home page where you can access other e-services if you wish.

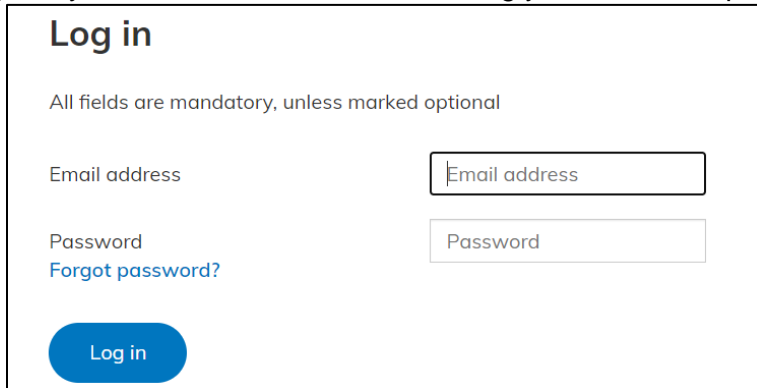


The next time you want to access the HSEp digital tool, you will do so through our online services log in page.

- Visit [wsib.ca](https://www.wsib.ca) and click on the blue “Log in” button in the header of any page. Then click on the **Log in** button on the page, which will take you to the online services log in page.
- Enter your email address and password, and click **Log in**
- You are now on the online services landing page – **look for the safety vest at the bottom right hand side of the page**, and click on the blue **Go** button to **Access health and safety programs**

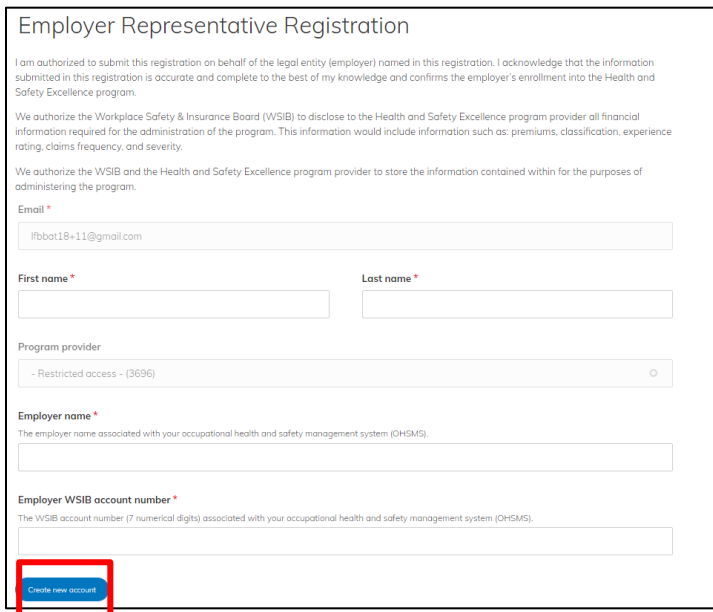
## How to access the digital tool **the first time** if you have a WSIB online services account

1. Obtain the registration link from your WSIB-approved Health and Safety Excellence program provider. Use Google Chrome internet browser to access the link. This link will bring you to online services page to login to online services.
2. Login to your online services account using your email and password:



The screenshot shows a login form titled "Log in". Below the title, it states "All fields are mandatory, unless marked optional". There are two input fields: "Email address" and "Password". A blue link "Forgot password?" is located below the password field. A blue "Log in" button is at the bottom left of the form.

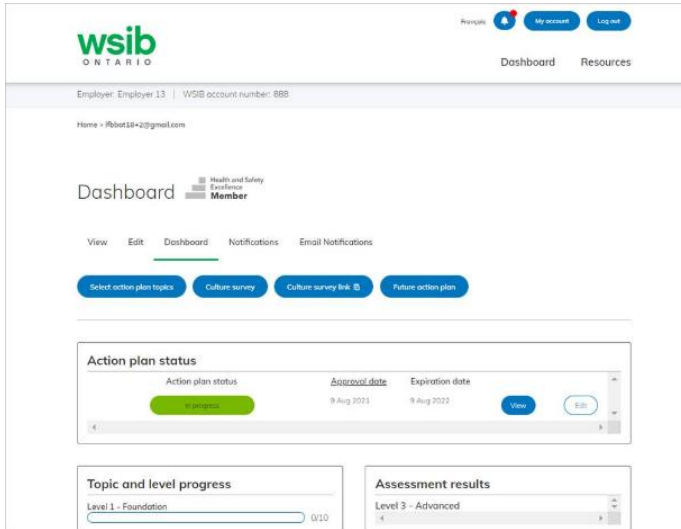
3. You will now see the “Employer representative registration” form. To setup your HSEp account, you need your business name and WSIB account number. Enter the information into the appropriate boxes on “Create new account” button.



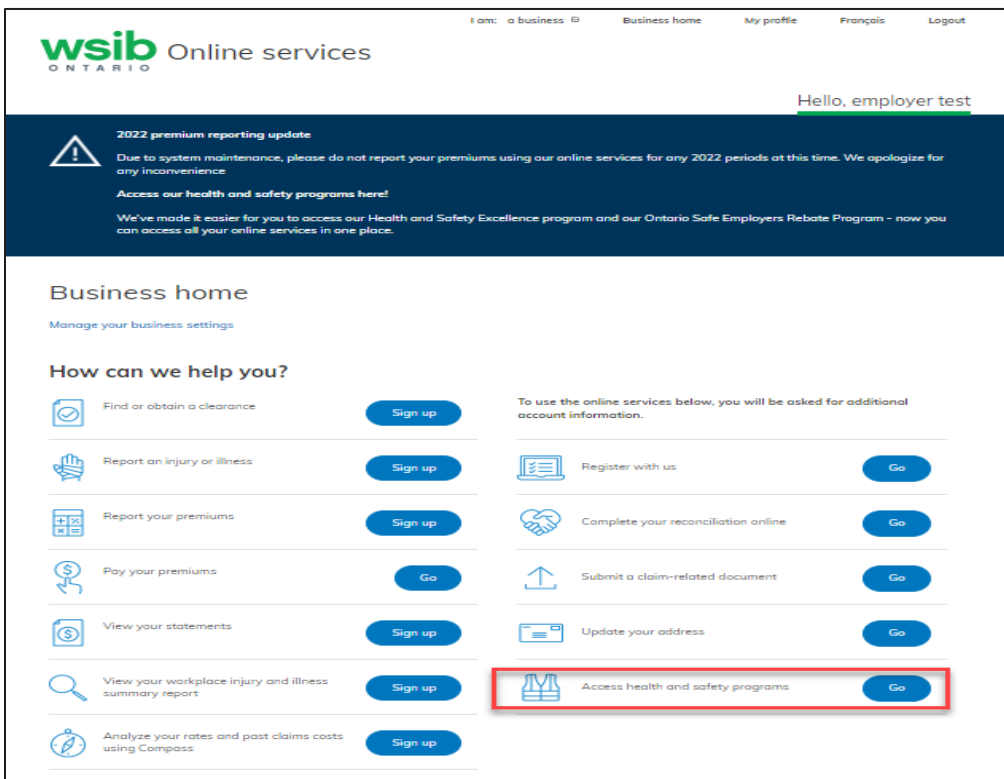
The screenshot shows the "Employer Representative Registration" form. It includes a disclaimer and two authorization statements. The form has several input fields: "Email \*", "First name \*", "Last name \*", "Program provider" (a dropdown menu), "Employer name \*", and "Employer WSIB account number \*". A blue "Create new account" button is at the bottom left, highlighted with a red box.

4. The dashboard for your business will display.





- When you click the 'Log out' button, you will be navigated to the business home page where you can access other e-services if you wish.



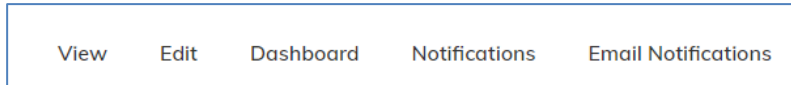
The next time you want to access the HSEp digital tool, you will do so through our online services log in page.

- Visit [wsib.ca](https://wsib.ca) and click on the blue “Log in” button in the header of any page. Then click on the **Log in** button on the page, which will take you to the online services log in page.
- Enter your email address and password, and click **Log in**

- You're now on the online services landing page – **look for the safety vest at the bottom right hand side of the page**, and click on the blue **Go** button to **Access health and safety programs**

For questions related to the digital tool, please email us at [health\\_and\\_safety@wsib.on.ca](mailto:health_and_safety@wsib.on.ca)

Once you have logged in, the first page displays your company name with five buttons along the top: 'View', 'Edit', 'Dashboard', 'Notifications' and 'Email Notifications'.



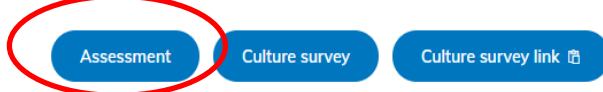
## Complete the health and safety assessment

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 'Dashboard'.



2. Click the 'Assessment' button.

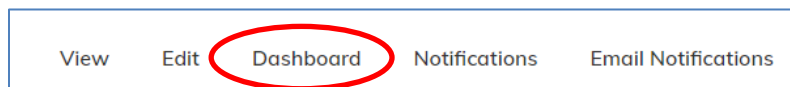


3. Answer the questions on the assessment by clicking on the available answer options.
4. Click 'Save Draft' button if you are unable to complete in one sitting. The progress bar along the top displays how close you are to completion.
5. Once you have answered all the questions, click the 'Done' button.

## Complete the safety culture survey

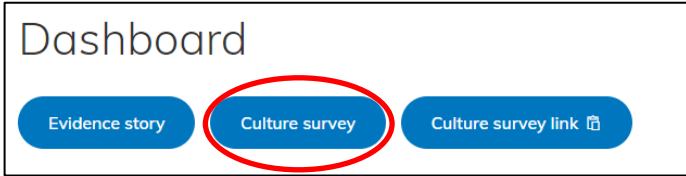
Although the survey is optional, we recommend asking all your employees to complete the survey annually. It should take less than 5 minutes to complete.

1. Click on 'Dashboard'.



### To complete the survey yourself

- Click the 'Culture survey' button.



- Answer the questions and hit the 'Submit' button at the bottom of the form.

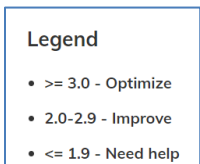
Your results will summarize automatically and will be viewable on your 'Dashboard' page in the "Culture survey" table.

Have additional employees fill out the culture survey:

- Copy the entire link/URL on your browser's address bar at the top (or click the 'Culture survey link' button on the dashboard).



- Using your own email application (such as 'Microsoft Outlook', 'Gmail', etc.), open a new email message and paste the link into the body of the email. Add an introduction message encouraging employees to complete the survey and let them know that it is anonymous and does not track or collect personal identifiers.
- Send the email to all your employees (or a representative group of employees) across your organization.
- Once employees click the link you sent, they will only see the survey screen and be able to complete the survey on a computer or smartphone without having to log into the system.
- They will receive their individual score and a corresponding legend similar to below:



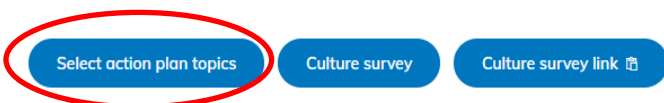
- Their results will also summarize automatically and will be viewable only to you on the 'Dashboard' page in the 'Culture survey' table.

Select topics and create your action plan

Click on 'Dashboard'.



Click 'Select action plan topics' button.



Your business name and program provider are pre-populated.

**Select Action Plan Topics**

Business \*

Program provider \*

Scoping implementation  
Scoping is full implementation of your action plan into less than 100% of your locations, sites or lines of business. An employer must decide if they are 'scoping' prior to submitting their action plan to their provider for approval. Financial recognition will be based on the scope of implementation – your provider can give you more detailed information on this option.

The star icons represent the recommended topics for your action plan. It is not mandatory to select these topics.

Topics	Selected Topic(s)
★ Level 1 - Foundation ^	
<input type="checkbox"/> ★ Leadership and commitment v	
<input type="checkbox"/> ★ Health and safety responsibility v	
<input type="checkbox"/> ★ Communication v	

## Scoping

- Scoping is full implementation of your action plan into less than 100% of your locations/sites or lines of business.
- If you 'check' the scoping implementation option, you also need to enter the scoping percentage. 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 is based on the scope of implementation – your provider can give you more detailed information on this option.
- See page 81 of the Health and Safety Excellence program member guidelines (V5 February 2021) for more details.

## How to select action plan topics

- Your level (based on your assessment results) and recommended action plan topics are noted with stars beside them. In the example below, the employer is in 'Level 1' and some of the recommended topics are 'Leadership and commitment', 'Health and safety responsibility' and 'Communication'.

**Topics**

- ★ Level 1 - Foundation ^
- ★ Leadership and commitment v
- ★ Health and safety responsibility v
- ★ Communication v
- Health and Safety Participation v

- Click a topic name or the down arrow beside it to display the topic description and any topic(s) suggested to complete prior to selecting the topic and/or other topics 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 by checking the box beside the topic name. Once you check the box, the topic displays in the section to the right titled 'Selected Topic(s)'. Click the blue "-" symbol to remove a topic from the 'Selected Topic(s)' section.

### Topic selection document

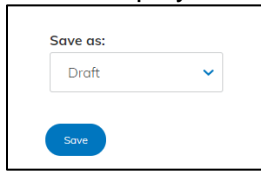
- It is not mandatory to upload a document in this section. However, your provider may ask you to upload a 'Topic selection document' that includes your justification for selecting your action plan topics. Once your provider approves the action plan, this document cannot be removed/added or revised.
- The 'Topic selection document' area is located under the 'Topics' table. To upload a document, click 'Choose File' button and provide a description of the document.

### Employer contact information

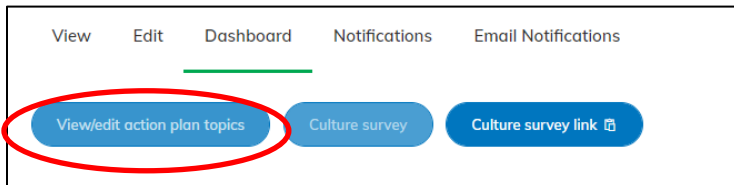
- WSIB may reach out to you during your participation in the program to see how things are going or during topic validation, if they have questions regarding the evidence submitted for a topic.

- Enter the contact name, email and phone number in the appropriate boxes and click the blue 'Create contact information' button. Enter a minimum of one/maximum two contacts when you create your draft action plan.
- Both the employer and provider can edit the contact information if necessary throughout the action plan cycle. Make sure this information is always kept up-to-date especially when you submit topics to the WSIB for validation.

- Click the 'Save' button at the bottom of your page. The 'Save as:' box at the bottom of the screen should display 'Draft' when you are saving a version not yet ready to send to your provider for review.

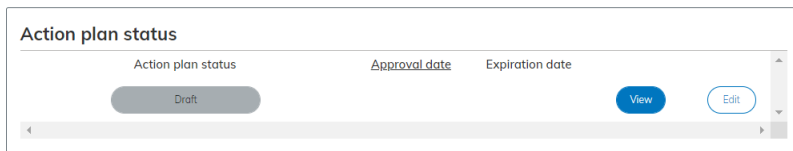


You can go back into your 'Draft' action plan by clicking on 'Dashboard' and the 'View/edit action plan topics' button.

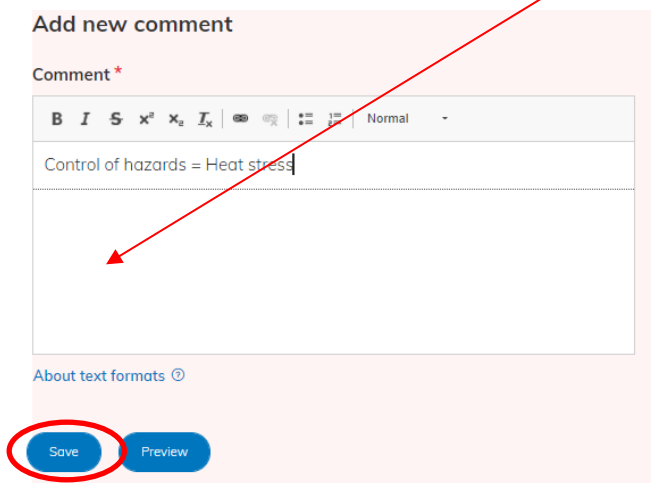


### Adding notes/comments to your action plan

- Once you save a draft version of your action plan, you can add notes/comments that will be visible by everyone – the WSIB, your provider and all your business employee reps with accounts in the digital tool.
- In your 'Action plan status' table, click the 'View' button beside your 'Draft' action plan.



- Type your notes/comments into the 'Add new comment' section in the middle of the screen and then click the 'Save' button under the table. For example, comments may include the control you are working on if you have selected the topic 'Control of hazards'. To return to the previous screen, click the back arrow at the top of the page.



### Submit your action plan to provider for review and approval

- Once you are ready to submit your 'Draft' action plan to your provider to 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.

Current state: Draft

Change to:

Draft

Draft

Ready for review

Save

You will receive a confirmation message at the top of your screen.

Employer: Employer 25 | WSIB account number: 876

**!** Action Plan *Employer 25 - Arie Stage - 2021-06-21* has been updated.

The status of the action plan changes from 'Draft' to 'Ready for provider review'. Your provider will receive a notification to review and approve your action plan.

**Action plan status**

Action plan status	Approval date	Expiration date
Ready for provider review		

View Edit

Once your provider approves your action plan, the status of it changes from 'Ready for provider review' to 'Approved'.


**Action plan status**

Action plan status	Approval date	Expiration date
Approved	27 Sep 2021	27 Sep 2022

View Edit

## Develop and demonstrate implementation of the topic


After your provider approves your action plan, you can navigate to the section where you select your implementation model, explain the work you have completed (evidence story) and upload evidence files to support the topic requirements. Once your action plan status is 'Approved', click the blue 'Evidence package' button from your dashboard (this button is only available after your provider has approved your action plan).

Dashboard 

View Edit **Dashboard** Notifications Email Notifications

Evidence package

Culture survey

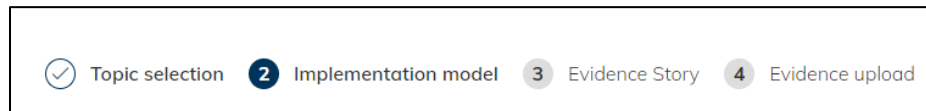
Culture survey link 

\*Note: As of September 1<sup>st</sup>, 2022, the evidence package has been updated on new action plans to streamline the upload process into 2 steps. If you selected topics for your action plan prior to September 1, 2022, you are likely to be using the 4 step model. Please reference the images below to know which steps apply to your action plan.

A process bar will appear along the top of the screen with the following sections:  
Are you seeing this image? (2 step evidence package) Follow steps starting on [page 24](#).



Are you are seeing this image? (4 step evidence story) Follow the below steps:



## 4 Step Evidence Story – Upload instructions

### 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. A table on the right side of your screen displays your 'Selected Topic(s)'. 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.

If there is a change in contact information for the action plan, topic selection is where you will update this information. To update:

1. Click on "topic selection" from your process bar along the top of the screen
2. Scroll to the bottom of the page where you will see the "Employer contact information" box

The screenshot shows a form titled "Employer contact information \*". Below the title is a table with one row containing the name "arie". To the right of the name is a grey "Edit" button. Below the table, there is a message: "You have added 1 out of 2 allowed contact information." and a blue "Add new contact information" button. At the bottom of the form, there is a note: "Provide the contact information of the person the WSIB validator should contact if they have questions regarding evidence submitted for your topic(s)." A red arrow points from the "Edit" button to the text below.

3. Click on "edit" for the information you would like to change or "add new contact information" to add a secondary set of contact details



- Update the information and then click on “update contact information” or “create new contact information”:

### Employer contact information \*

---

**Contact Name \***

**Email \*** **Phone Number \***

---

You have added 1 out of 2 allowed 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).

- Scroll to the bottom of the page and click on “save” to complete the changes.

## 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:

- Select either WSIB's “Five Steps to Managing Health and Safety”, "Plan/Do/Check/Act" or ‘Other provider-approved model’. **Please note that once you select and save your implementation model, it cannot be changed until you develop your next action plan.** Please ensure you discuss with your provider the model that best fits your needs before making your selection.
- If you select ‘other provider-approved model’ you must upload a ‘topic implementation document’ containing your evidence story. If you selected ‘WSIB 5 steps’ or ‘Plan/do/check/act’, uploading a topic implementation document is optional.

**Select the model you will use to implement your topic(s)**

---

WSIB 5 Steps to Managing Health and Safety

Plan / Do / Check / Act

Other provider-approved model

**Topic implementation document**

---

No file chosen

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

To upload a document, click ‘Choose File’ and then provide a description of the document. Once uploaded, to view the ‘topic implementation document’, click the file name (hyperlinked in blue text). The file downloads and appears at the bottom of your screen. If you do not submit all your action plan topics for validation at the same time, you can remove, revise and upload the topic implementation document again to reflect the evidence story for all topics.

Select the ‘Save and continue’ button at the bottom of the screen.

## Evidence story

You are not able to open this page until you have selected your implementation model.

If you have selected ‘WSIB's Five Steps to Managing Health and Safety’ or ‘Plan/Do/Check/Act’ as your implementation model, you have the option to explain how you made your topic(s) "living and breathing" in this

workspace or upload a 'topic implementation document' with your evidence story as noted in the step above. If you have selected 'Other provider-approved model' this page will not open.

To document your evidence story in this area, click 'Edit' beside the topic name.

The section will populate with either WSIB 5 steps (Standard, Communicate, Train, Evaluate, and Make improvements and acknowledge success) or Plan/Do/Check/Act depending on the implementation model you selected in the previous step. Click 'Edit' beside the step name:

Enter your evidence story for that step in the appropriate text box. In the example below for the topic 'Leadership and commitment', you would enter the verbiage for the step 'Plan' in this text box.

Leadership and commitment Draft

Plan

Body

**B I S x<sup>2</sup> x<sub>2</sub> I<sub>x</sub>** | | Normal

We are a new commercial operation of widgets. As such, there wasn't a Health and Safety Program in place and it had to be built from scratch. We believe that Commitment, Communication, Participation and Hazard Identification are the cornerstones of a strong health and safety program. Therefore, the JHSC looked at each of the four main areas and planned out what would be the foundation of our Health and Safety Program.

The plan in this case was to ascertain a firm commitment (in writing) from the CEO that he is fully committed to the Health and Safety of our work force, the implementation of a JHSC and...

About text formats ⓘ

**Update evidence story step** Cancel

Do Edit

Check Edit

Act Edit

**Update evidence story** Cancel

Click the blue **'Update evidence story step' button** and continue the same process for each step always clicking **'Update evidence story step' button** before entering text for the next step.

When you are finished entering the evidence story for that topic, click the blue **'Update evidence story'** button. Continue the same process for each topic and when you are done entering everything, click the blue **'Save and continue'** button at the bottom of the screen.

If you selected 'Other provider-approved model' in the step above, the 'Evidence story' section will not expand. Upload your evidence story for your topic(s) in the **'topic implementation document'** section or include it as one of your five (5) evidence files in the 'Evidence upload' section as noted below.

### Evidence upload

You are not able to open this page until you have selected your implementation model. Click the 'Edit' button to the right of the topic name. This will expand the topic.

Health and safety communication Draft Edit

Click 'Upload Evidence file' button under 'Evidence Files.'

- ✓ Topic selection   ✓ Implementation model   ✓ Evidence Story   **4** Evidence upload

## Evidence package

### Leadership and commitment

Draft

#### Evidence files

You have added 0 out of 5 allowed evidence files.

Upload evidence file

Submit to provider for review

**Defer a topic:** If you are unable to complete this topic within your current action plan, please speak to your provider about deferring the topic.

Update evidence

Cancel

To upload evidence files to each topic:

1. Open the topic by using “edit”
2. Under “Evidence Files”, click on “Upload Evidence file”
3. Name your file
4. Click on “choose file” to select a file from your computer **or** drag a file off your desktop and drop over the “choose file” button
  - a. You will see a navy blue gear beside the file while it uploads to the system
  - b. Once the gear has disappeared, click on “Upload evidence file”
  - c. Repeat upload for up to (5) files.

**Evidence files**

You have added 0 out of 5 allowed evidence files.

**Name \***

**Evidence \***

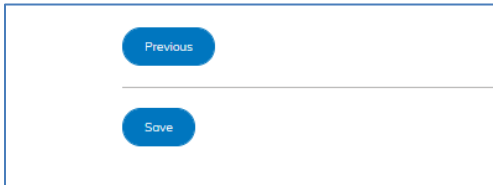
No file chosen

One file only.  
50 MB limit.  
Allowed types: doc docx flv gif jpg jpeg mov mp3 mp4 pdf png ppt pptx txt xls xlsx.

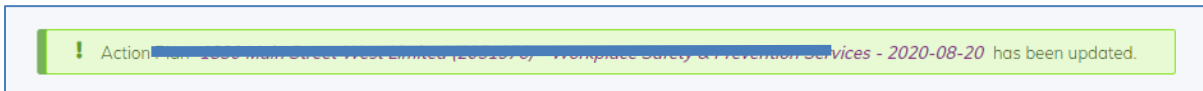
Submit to provider for review

**Defer a topic:** If you are unable to complete this topic within your current action plan, please speak to your provider about deferring the topic.

- Once you have completed uploading your evidence story and files, click on “update evidence package” to collapse the topic tray, and click “Save” at the bottom of the pages to save all changes made.



- If you have done this successfully, scroll to the top of your screen and you should get a message indicating that your action plan has been updated.



**Other important things:**

- Make sure your [employer contact information](#) is up-to-date in case your provider or the WSIB needs to reach out to you regarding your topic submission.
- If you are working on ‘Control of Hazards’ topic make sure you have noted the control you are working on in the comment section on the action plan page

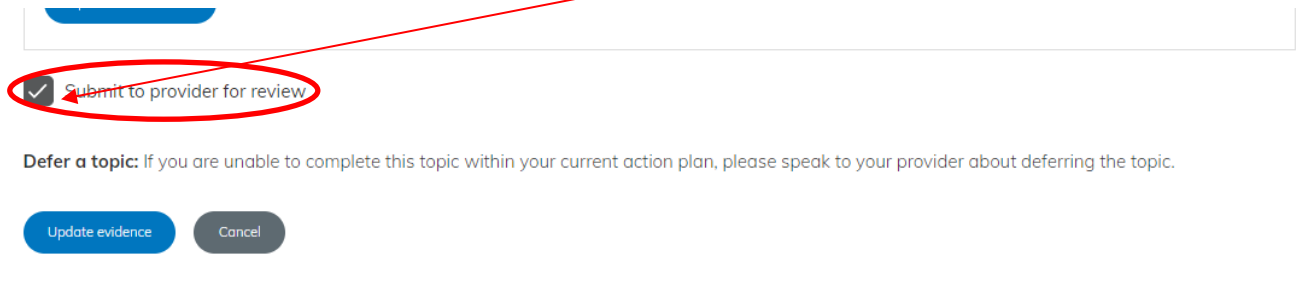
**Submit topic(s) to Provider to review and submit to the WSIB for validation**

When one or more topics are fully implemented in your workplace and your evidence story and evidence files have been uploaded, you can submit the topic(s) to your provider to review.

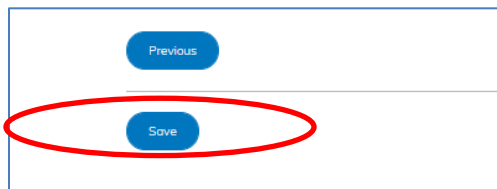
In the 'Evidence upload' section, click 'Edit' beside the topic you wish to submit.



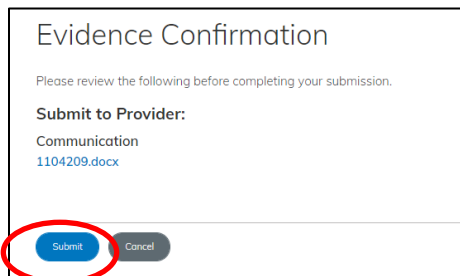
Check the box beside 'Submit to provider for review'. Click the blue 'Update evidence' button. **Continue this process for each topic you wish to submit to your provider.**



Once you have completed this step for all topics, scroll to the bottom of the screen and select the 'Save' button.



On the 'Evidence Confirmation' screen, review the topics and evidence files to ensure they are accurate and click the blue 'Submit' button to submit the topics to the provider for review.



Once you submit topic(s) to your provider for review, the status of your topic will change from 'Draft to 'Ready for provider review'.



Your provider will review your topic evidence to ensure you have met the topic requirements. When they submit the topic(s) to the WSIB for validation, the status of your action plan as noted in the 'Action plan status' table changes from 'Approved' to 'In progress'.

Action plan status	Approval date	Expiration date	
In progress	5 Aug 2021	5 Aug 2022	View Edit

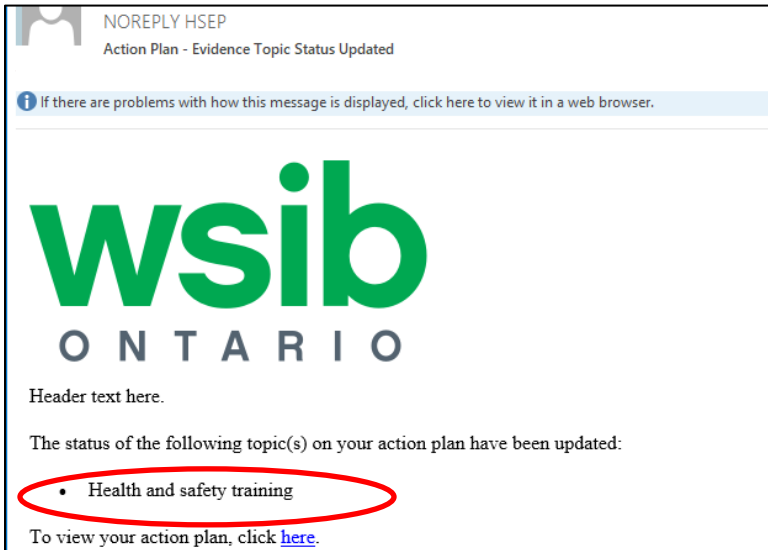
In addition, the status of the topic(s) changes from 'Ready for provider review' to 'In progress' which means the topic is with the WSIB for validation.

Review health and safety trends	In progress	Edit
---------------------------------	-------------	------

### Receiving validation results from the WSIB

The WSIB validator will review your topic evidence story and evidence files to ensure you have met the topic requirements/criteria and the topic is 'living and breathing' in your workplace.

If you subscribe to notifications from the digital tool, you will receive a notification when they have completed their review similar to the notification below. The email is from 'NOREPLY WSIB' and includes the name of the topic.



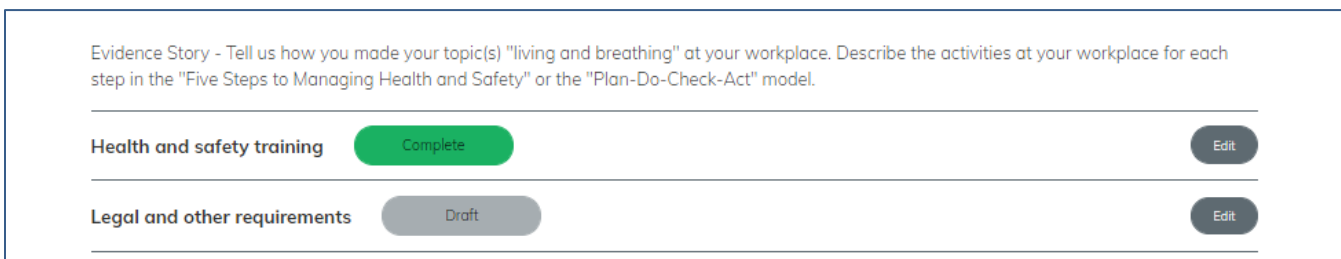
\* If you are receiving a "Access Denied" message from this email, please ensure that you have logged into the digital tool through online services before clicking on the notification.

To review the results of the validation and the validator comments:

- Click on 'Dashboard'
- In your 'Action plan status table', click the 'Edit' button on the far right

Action plan status	Approval date	Expiration date	
In progress	28 Sep 2021	28 Sep 2022	View Edit

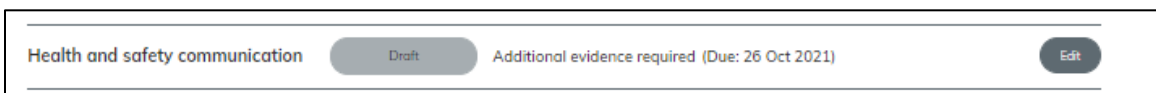
- This displays the list of topics on your approved action plan including the topic status
- For topics with status:
  - Draft: additional evidence required – see section below titled ‘Additional evidence required to support topic implementation’
  - Complete – click ‘Edit’ beside the topic name to review the validator comments related to that topic. Although the topic is ‘complete’, based on the validator’s experience, knowledge and industry best practices, they may share valuable information helpful to your business for continual improvement related to that topic.
  - Incomplete – click ‘Edit’ beside the topic name to review the validator’s comments related to that topic. The validator will outline what is missing from the evidence related to the topic requirements and provide their rationale for why they considered the topic to not be ‘living and breathing’ at the workplace



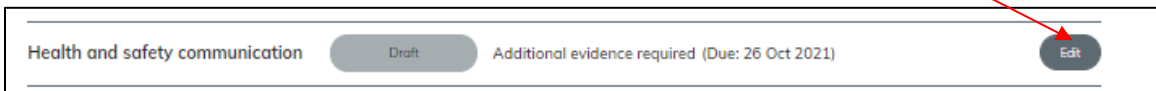
## Additional evidence required to support topic implementation

If you receive a notification from the WSIB Validator that additional evidence is required to complete a topic, the additional evidence that addresses the gap(s) identified must be submitted by your provider (on your behalf) to the WSIB within 60-calendar days.

You will notice the topic requiring additional evidence has reverted to ‘Draft’ status with the verbiage ‘Additional evidence required’ beside the topic name on both the ‘Evidence story’ and ‘Evidence upload’ pages. It also lists the date the additional evidence is due to the WSIB. Check with your provider on the date they require you to submit the new evidence for the topics in order to meet this deadline. In the example below, additional evidence for ‘Health and safety communication’ is due to the WSIB by October 26, 2021.



In order to see the ‘Reason additional evidence is required’, click the ‘Edit’ button to the right of the topic name.



The notes/letter from the validator will highlight the specific gaps they have identified in your submission and the evidence they are looking for in order to change the topic status to ‘complete’.

To revise your evidence story and upload an additional evidence file to address the gaps:

1. Revise your evidence story by either uploading a revised/new implementation model document or adding to the verbiage in your evidence story page. Follow the steps above outlined in bullet #3 titled ‘Evidence story’. Be sure to indicate that this is ‘additional evidence’.



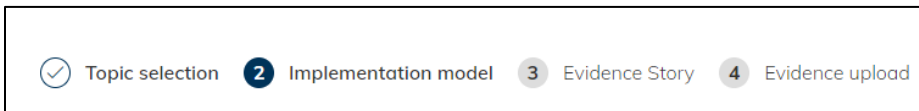
2. Upload **one (1)** additional evidence file that addresses the gaps identified by the validator. Follow the steps above outlined in bullet #4 titled 'Evidence upload'.
3. Follow the steps above in the section titled 'Submit topic(s) to your provider to review and submit to WSIB for validation'.

## Defer a topic

If you are unable to complete a topic within your action plan cycle, you can choose to 'defer' a topic to a future program year. Please speak with your provider, as they will defer the topic on your behalf.

## 2 Step Evidence Package – Upload instructions

Are you are seeing this image? (4 step evidence story) Follow the steps starting [on page 14](#).



Are you seeing this image? (2 step evidence package) Follow the steps below:



## Approved Topics

View the list of your approved action plan topic(s) by clicking on 'Approved Topics' in the process bar along the top of the screen. A table on the right side of your screen displays your 'Selected Topic(s)'. 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.

If there is a change in contact information for the action plan, topic selection is where you will update this information. To update:

1. Click on "topic selection" from your process bar along the top of the screen
2. Scroll to the bottom of the page where you will see the "Employer contact information" box

**Employer contact information \***

---

arie Edit

---

You have added 1 out of 2 allowed contact information.

Add new 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).

3. Click on “edit” for the information you would like to change or “add new contact information” to add a secondary set of contact details
4. Update the information and then click on “update contact information” or “create new contact information”:

### Employer contact information \*

---

**Contact Name \***

**Email \*** **Phone Number \***

Update contact information
Cancel

---

You have added 1 out of 2 allowed contact information.

Add new 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).

Scroll to the bottom of the page and click on “save” to complete the changes.

## Evidence Package

The evidence package is where you will upload your evidence story document and the evidence files for each topic. To open the topic and begin uploading documents, click on “edit”:

✓ Approved topics
2 Evidence package

### Evidence package

Leadership and commitment	Draft	<span style="background-color: #0070c0; color: white; padding: 5px 15px; border-radius: 5px;">Edit</span>
Health and safety responsibility	Draft	<span style="background-color: #0070c0; color: white; padding: 5px 15px; border-radius: 5px;">Edit</span>
Communication	Draft	<span style="background-color: #0070c0; color: white; padding: 5px 15px; border-radius: 5px;">Edit</span>
Health and Safety Participation	Draft	<span style="background-color: #0070c0; color: white; padding: 5px 15px; border-radius: 5px;">Edit</span>
Recognition of hazards	Draft	<span style="background-color: #0070c0; color: white; padding: 5px 15px; border-radius: 5px;">Edit</span>

This will open the section where you will upload (1) one evidence story document and up to (5) five evidence files.

Approved topics  Evidence package

### Evidence package

Leadership and commitment

Draft

#### Evidence story

Upload evidence story

#### Evidence files

You have added 0 out of 5 allowed evidence files.

Upload evidence file

Submit to provider for review

**Defer a topic:** If you are unable to complete this topic within your current action plan, please speak to your provider about deferring the topic.

Update evidence package

Cancel

Health and safety responsibility

Draft

Edit

## Evidence Story

1. To add your evidence story document (using the WSIB 5 steps (Standard, Communicate, Train, Evaluate, and Make improvements and acknowledge success) or Plan/Do/Check/Act or your providers template), click on “upload evidence story”.

The evidence story file will accept one (1) file that is up to 50mb in size and supports doc docx flv mov mp3 mp4 pdf txt xls xlsx.types. Your evidence story is required before you can submit the topic to the provider for review.

Evidence package

Leadership and commitment

Draft

**Evidence story**

**Name \***

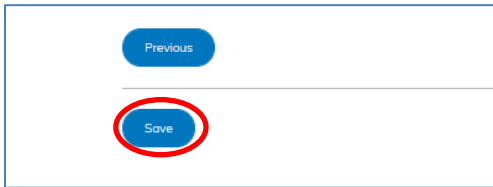
**Evidence story \***

Choose File | No file chosen

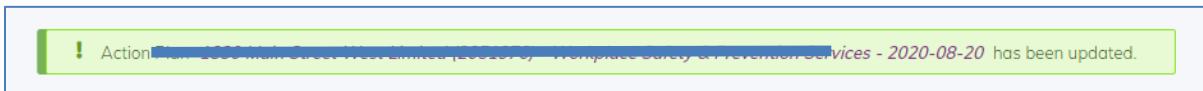
One file only.  
50 MB limit.  
Allowed types: doc docx flv mov mp3 mp4 pdf txt xls xlsx.

Upload evidence story | Cancel

- a) Name your file
- b) Click on “choose file” to select a file from your computer **or** drag a file off your desktop and drop over the “choose file” button
  - I. You will see a navy blue gear beside the file while it uploads to the system
  - II. Once the gear has disappeared, click on “Upload evidence story”
- c) To save the information you’ve just entered, scroll to the bottom of the page and click on “save”.



- d) If you have done this successfully, scroll to the top of your screen and you should get a message indicating that your action plan has been updated.



## Evidence Files

The digital tool allows for up to 5 files to be uploaded per topic, each file has a maximum allowed size of 50mb and supports: doc docx flv gif jpg jpeg mov mp3 mp4 pdf png ppt pptx txt xls xlsx. file types.

Approved topics **2** Evidence package

### Evidence package

#### Leadership and commitment

Draft

##### Evidence story

Upload evidence story

##### Evidence files

You have added 0 out of 5 allowed evidence files.

Upload evidence file

Submit to provider for review

**Defer a topic:** If you are unable to complete this topic within your current action plan, please speak to your provider about deferring the topic.

Update evidence package

Cancel

#### Health and safety responsibility

Draft

Edit

To upload evidence files to each topic:

7. Open the topic by using “edit”
8. Under “Evidence Files”, click on “Upload Evidence file”
9. Name your file
10. Click on “choose file” to select a file from your computer **or** drag a file off your desktop and drop over the “choose file” button
  - a. You will see a navy blue gear beside the file while it uploads to the system
  - b. Once the gear has disappeared, click on “Upload evidence file”
  - c. Repeat upload for up to (5) files.

**Evidence files**

You have added 0 out of 5 allowed evidence files.

**Name \***

**Evidence \***

Choose File No file chosen

One file only.  
50 MB limit.  
Allowed types: doc docx flv gif jpg jpeg mov mp3 mp4 pdf png ppt pptx txt xls xlsx.

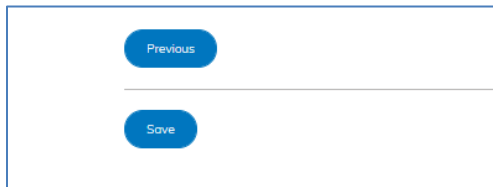
Upload evidence file Cancel

Submit to provider for review

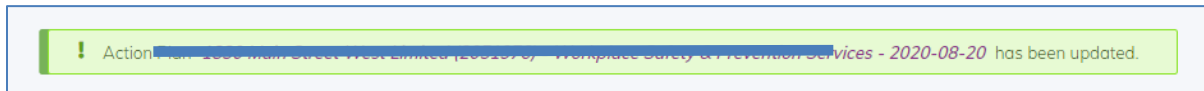
**Defer a topic:** If you are unable to complete this topic within your current action plan, please speak to your provider about deferring the topic.

Update evidence package Cancel

11. Once you have completed uploading your evidence story and files, click on “update evidence package” to collapse the topic tray, and click “Save” at the bottom of the pages to save all changes made.



12. If you have done this successfully, scroll to the top of your screen and you should get a message indicating that your action plan has been updated.



## Submit topic(s) to Provider to review and submit to the WSIB for validation

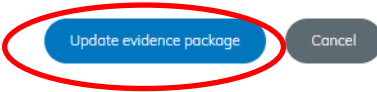
When one or more topics are fully implemented in your workplace and your evidence story and evidence files have been uploaded, you can submit the topic(s) to your provider to review.

In the ‘Evidence package’ section, click ‘Edit’ beside the topic you wish to submit.

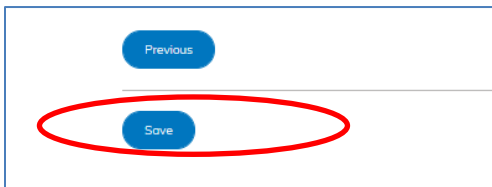
1. Check the box beside 'Submit to provider for review'. Click the blue 'Update evidence package' button. **Continue this process for each topic you wish to submit to your provider.**

Submit to provider for review ←

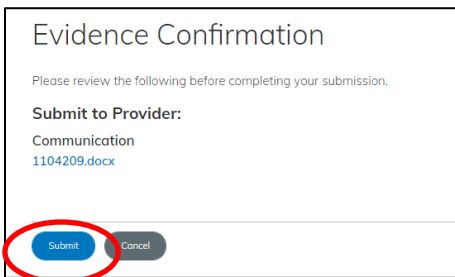
**Defer a topic:** If you are unable to complete this topic within your current action plan, please speak to your provider about deferring the topic.



2. Once you have completed this step for all topics, scroll to the bottom of the screen and select the 'Save' button.



3. On the 'Evidence Confirmation' screen, review the topics and evidence files to ensure they are accurate and click the blue 'Submit' button to submit the topics to the provider for review.



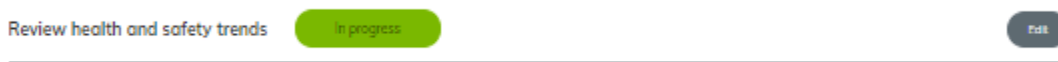
4. Once you submit topic(s) to your provider for review, the status of your topic will change from 'Draft to 'Ready for provider review'.



5. Your provider will review your topic evidence to ensure you have met the topic requirements. When they submit the topic(s) to the WSIB for validation, the status of your action plan as noted in the 'Action plan status' table changes from 'Approved' to 'In progress'.

Action plan status			
Action plan status	Approval date	Expiration date	
In progress	5 Aug 2021	5 Aug 2022	View Edit

- In addition, the status of the topic(s) changes from 'Ready for provider review' to 'In progress' which means the topic is with the WSIB for validation.



## Receiving validation results from the WSIB

The WSIB validator will review your topic evidence story and evidence files to ensure you have met the topic requirements/criteria and the topic is 'living and breathing' in your workplace.

If you subscribe to notifications from the digital tool, you will receive a notification when they have completed their review similar to the notification below. The email is from 'NOREPLY WSIB' and includes the name of the topic.



\* If you are receiving a "Access Denied" message

from this email, please ensure that you have logged into the digital tool through online services before clicking on the notification.

To review the results of the validation and the validator comments:

- Click on 'Dashboard'
- In your 'Action plan status table', click the 'Edit' button on the far right

Action plan status			
Action plan status	Approval date	Expiration date	
In progress	28 Sep 2021	28 Sep 2022	View Edit

- This displays the list of topics on your approved action plan including the topic status
- For topics with status:
  - Draft: additional evidence required – see section below titled 'Additional evidence required to support topic implementation'



- Complete – click ‘Edit’ beside the topic name to review the validator comments related to that topic. Although the topic is ‘complete’, based on the validator’s experience, knowledge and industry best practices, they may share valuable information helpful to your business for continual improvement related to that topic.
- Incomplete – click ‘Edit’ beside the topic name to review the validator’s comments related to that topic. The validator will outline what is missing from the evidence related to the topic requirements and provide their rationale for why they considered the topic to not be ‘living and breathing’ at the workplace

Click on “edit” to view the validator comments on the topic

Approved topics   
  Evidence package

Evidence

---

Leadership and commitment Complete → Edit

The comments will appear at the top of the topic screen:

Approved topics   
  Evidence package

Evidence

---

Leadership and commitment Complete

Validation comments  
August 31, 2022  
Business Information

Topic: Decision

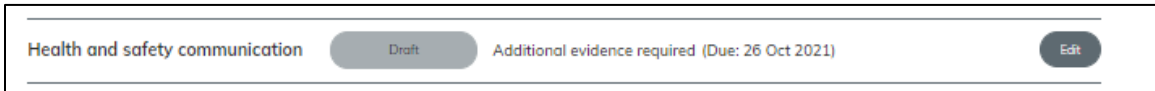
This is an example of a validation comment, this is where you'll see the comments from the WSIB team.

Validator information

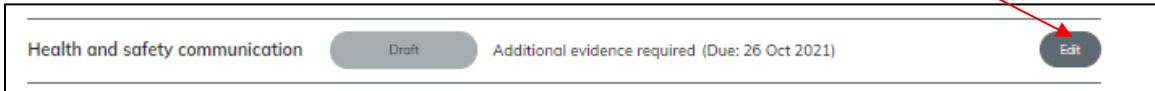
## Additional evidence required to support topic implementation

If you receive a notification from the WSIB Validator that additional evidence is required to complete a topic, the additional evidence that addresses the gap(s) identified must be submitted by your provider (on your behalf) to the WSIB within 60-calendar days.

You will notice the topic requiring additional evidence has reverted to ‘Draft’ status with the verbiage ‘Additional evidence required’ beside the topic name. It also lists the date the additional evidence is due to the WSIB. Check with your provider on the date they require you to submit the new evidence for the topics in order to meet this deadline. In the example below, additional evidence for ‘Health and safety communication’ is due to the WSIB by October 26, 2021.



In order to see the 'Reason additional evidence is required', click the 'Edit' button to the right of the topic name.



The notes/letter from the validator will highlight the specific gaps they have identified in your submission and the evidence they are looking for in order to change the topic status to 'complete'.

To revise your evidence story and upload an additional evidence file to address the gaps:

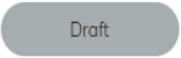

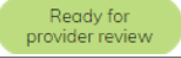
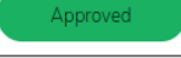
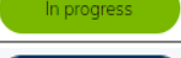
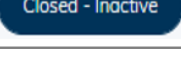
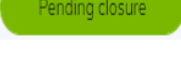
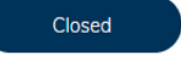
4. Upload **one (1)** additional evidence story with revised/new implementation model document in the evidence story upload. Follow the steps above outlined in 'Evidence story'.
5. Upload **one (1)** additional evidence file that addresses the gaps identified by the validator. Follow the steps above outlined in bullet #4 titled 'Evidence files'.
6. Follow the steps above in the section titled 'Submit topic(s) to your provider to review and submit to WSIB for validation'.

## Defer a topic

If you are unable to complete a topic within your action plan cycle, you can choose to 'defer' a topic to a future program year. Please speak with your provider, as they will defer the topic on your behalf.

## Action plan status

Once your action plan is created, it will have an overall status of the stage you are currently at on the journey.

Action plan status	Description
	The action plan has been created not yet submitted to the provider for review
	The action plan was created but not submitted or not approved within 90 days from creation date
	The action plan has been submitted to the provider for review
	The action plan has been approved by the provider but no topics have been submitted yet to the WSIB for validation
	At least 1+ topic(s) have been submitted to the WSIB for validation or 1+ topic(s) have been deferred
	Action plan has expired and no topics were submitted to the WSIB for validation or deferred – system will automatically validate each topic as 'incomplete'. No further action allowed - ability to view action only.
	All topics have received final desk validation results and business is 'waiting' to be notified that either they have been selected for an onsite validation or that desk validation results on final.
	Businesses are in the process of going through an 'on-site' validation. Action plan remains with 'pending closure' until on-site validation is completed and results entered in the system.
	Action plan has expired but at least one or more topics or in the process of being validated. Validation will continue but the business can not upload/edit anything new unless it has been sent back for additional evidence.
	At least 1+ topic(s) submitted for WSIB validation or 1+ topic(s) deferred and action plan now has final validation results on all approved action plan topics. No further action allowed - ability to view only.

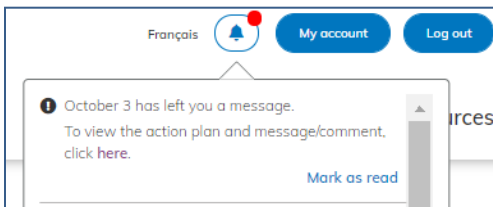
In order to be eligible for a rebate run, your action plan status must be 'CLOSED'. The action plan status 'PENDING CLOSURE' will NOT be included.

## Topic status

Once your action plan is 'approved', the status of each topic is displayed to the right of topic name on both the 'Evidence story' and 'Evidence upload' pages:

Topic status	Description
<b>Draft</b>	Topic is with the employer to write the evidence story and upload evidence files.
<b>Ready for provider review</b>	Evidence story/files submitted to provider for review.
<b>In progress</b>	Topic submitted by provider to WSIB for validation and has been assigned to a validator.
<b>Draft</b> Additional evidence required (Due: 1 Dec 2020)	WSIB Validator requires additional evidence to confirm topic is 'living and breathing'.
<b>In progress</b> Additional evidence required (Due: 4 Jan 2021)	Additional evidence submitted by employer and topic is with WSIB for validation.
<b>Complete</b>	WSIB Validator decision that topic is 'living and breathing' in workplace. Rebate and/or recognition are pending onsite validation results (if selected).
<b>Incomplete</b>	<ul style="list-style-type: none"> <li>WSIB Validator decision that topic is not 'living and breathing' in workplace; or</li> <li>Additional evidence for topic validated 'additional evidence required' not submitted within 60 days; or</li> <li>No topic evidence submitted to WSIB for validation prior to action plan expiry date.</li> </ul>
<b>Deferred</b>	The employer is self-declaring they will not complete the topic during current action plan cycle; can defer without submitting any evidence to the WSIB or after topic has been validated as additional evidence required.

## Notifications (within digital tool)



- An 'alarm button' is displayed along the top of the screen to notify you about key activities that require your attention – see the section below titled 'Email notifications' to see the list of key activities.
- When there is a 'new' notification for the user, a little red circle appears.
- Once you click 'Mark as read', the verbiage for that notification changes to 'Mark as unread'. Do this for all new notifications, refresh your screen and the red circle goes away until there is another new notification.
- Any notifications older than 30 days are automatically deleted by the system.

## 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 'Dashboard' on the top of your screen and then the 'Email Notifications' button. Click 'Unsubscribe' under 'Email Notification Settings' then click 'Save'.

## Types of notifications

Notification / Subject	Recipient	Copy - Email and Web Notification
Action Plan - Approved	Employer	[PROVIDER] has approved your action plan on [APPROVAL_DATE]. You now have 365 days from [APPROVAL_DATE] to submit your evidence story for review. To view your action plan, click ["here"]LINK TO ACTION PLAN]
Action Plan - New Comment	Employer & Provider	[COMMENTER] has commented on your action plan. To view the action plan and comment, click ["here"]LINK TO ACTION PLAN]
Action Plan - Expiry	Employer	Your action plan will expire in [INTERVAL] days. To view your action plan, click ["here"]LINK TO ACTION PLAN]
Submission - Topic Status	Employer & Provider	The status of the following topic(s) for your action plan have been updated: [TOPICS]. To view your action plan, click ["here"]LINK TO ACTION PLAN]
Evidence - Additional Evidence Required	Employer	One or more topics on your action plan requires additional evidence to be added within [INTERVAL] days. To view your action plan, click ["here"]LINK TO ACTION PLAN]
Employer Report Card - Available	Employer	Your [DATE RANGE - START DATE] to [DATE RANGE - END DATE] achievement report for [EMPLOYER] is now available. To view your achievement report, click ["here"]LINK TO EMPLOYER REPORT CARD]

## Employer achievement report

- An achievement report specific to your business is available within the digital tool after your action plan is closed and the next rebate run has occurred. You will receive a notification when it's available. Rebates are issued quarterly.
- The achievement report is accessible from the 'Action plan history' table. Click the 'View' button to display the report.

rovider	Topics completed	On-site validation	Badges earned	Rebate	Rebate date	Average culture score	Culture count
-	1	Yes		\$50,000.00		0	0 employees

The 'View' button in the bottom right corner of the table is circled in red.

- The report tracks your current and previous accomplishments including your action plan validation results, progress on topic and level completion, current rebate entitlement as well as total rebates earned in the program.

## Reconsideration of validation results

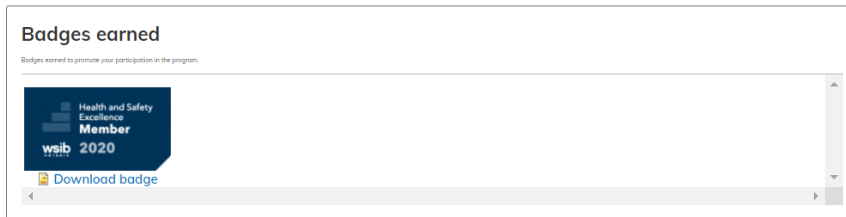
An employer can choose to have their results/rebate amount reconsidered:

- The employer has 30-calendar days from the date their achievement report is posted to complete and submit the 'reconsideration request' in the digital tool. This date is displayed at the bottom of the achievement report.

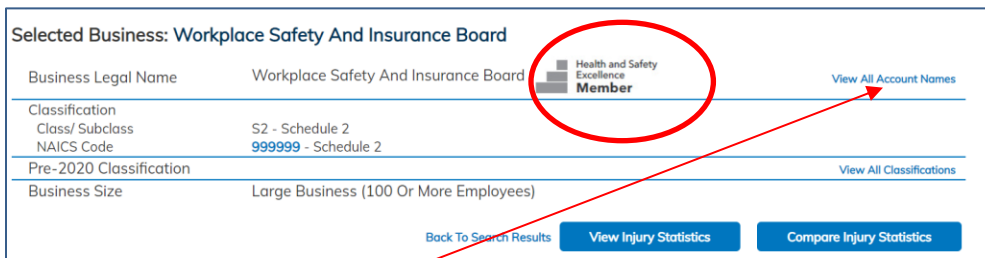
- The link to the reconsideration form is at the bottom of the employer achievement report.
- The results of the reconsideration are posted in the comment section on the action plan page.

## Badges

- Once you have an approved action plan, your Health and Safety Excellence program member badge displays in the 'Badges earned' table.
- Promote your participation in the program by downloading the badge and using it according to the document titled 'HSEp Badges Terms of Use'.



- In addition, your membership in the program is displayed on Safetycheck where anyone can use the WSIB website to find and compare health and safety statistics for businesses across the province. Search by business name, business type, and/or business size. **Learn more** about the information you can search.



- Click 'View all Account Names' to see the legal names and addresses of the accounts under that business legal name registered in the program. The registration date is also displayed.

Accounts			
Trade Name	Address	Health and safety excellence program	Member Since
Workplace Safety And Insurance Board	200 Front St West, Toronto, ON, Canada	Health and Safety Excellence Member	January 29, 2020

View Health and Safety Excellence Program participation and membership history, [download here](#).

## Resources

This table contains resources to assist you in the Health and Safety Excellence program, including the Health and Safety Excellence program member guidelines.

## Managing multiple WSIB account numbers with single email address

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 tool:

**\*\*Please note you can skip to step number 6 if one of the accounts are already registered\*\***

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 the link within the email received. Clicking the link will take you to a 'Set Password' page.
5. Create and remember your password. Click 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 'Edit' and then click '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 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 tool**

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 'Edit' and then click 'Add new employer representation' at the bottom of the page.
3. Input the employer name and the employer WSIB account number then click 'Create employer representation' then click 'Save'.
4. At the top of your screen, you should see a 'Switch Employer' box. Click 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, evidence story and upload evidence files. If the 'Switch Employer' filter does not display, a Site Admin will receive an alert to look into this for you.

## Multiple users for one WSIB account number

An unlimited amount of users from the same employer (each with their own unique email address) can access a single WSIB account number registered in the program. To do this, reach out to your provider and ask them for their registration link. Click the link and fill out the form with the business's name, WSIB number and your email address. You will then receive a confirmation email and be able to login, view and perform activities related to your business' action plan.

## Multiple account numbers under the same organization ID

Businesses who share the same Org ID have the option to complete one assessment and create one action plan **at the organization level** and apply it (opt in) across any WSIB account number that shares the same Org ID. See page 83 of the Health and Safety Excellence program member guidelines for more details.

Ideally, the decision to create an action plan at the Org level is made prior to the primary and secondary accounts wishing to opt in have performed any activities within the digital tool. Once the primary account 'opts-in' any secondary account to their action plan, the progress of the secondary account 'freezes' at whatever stage they were currently at. The secondary account representatives are only able to view the action plan for the primary account opted-into. The buttons available to them are 'View action plan', 'culture survey', and 'culture survey link'.

### **Instructions for creating an action plan at the organization level:**

- Any WSIB account number that shares an ORG ID with one or more WSIB account numbers, are able to view the ORG ID they belong to as well as a symbol that identifies them as either the primary or secondary account the first time they log into the digital tool. Look at the header with your employer name, WSIB account number and ORG ID. Beside your ORG ID number is the symbol.

Primary account identified by this symbol



Secondary account identified by this symbol



- They system automatically determines the primary account; it is allocated to the lowest WSIB account number of all employers who share the same organization ID. If you wish to change the primary account, please discuss with your provider.
- The primary account must identify the secondary accounts participating in their action plan prior to the approval of the primary account's action plan.
- When the primary account selects their action plan topics, clicks 'Save' and then 'Edit', a list of **ALL** employers (regardless of whether or not that employer has registered in the digital tool) who share the same Org ID are listed in the table titled 'Participating employers'.
- If the organization wants one action plan applied across multiple WSIB accounts, the primary employer 'opts-in' those accounts by checking the box beside the employer name and account number. Once the accounts are selected, click the 'SAVE' button at the bottom of the screen.
- Once the primary account 'opts-in' a secondary account to their action plan, the progress of the secondary account 'freezes'. The secondary account representatives can now only view the action plan for the primary account they are opted-into. The buttons available to them are 'View action plan', 'culture survey', and 'culture survey link'. In this case, because there action plan was in 'DRAFT' status before the primary account 'opted' them in, the AP status remains as DRAFT.

## Topics and your next action plan – future action plan

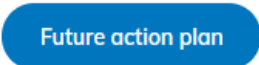
As you are working through your current action plan, the digital tool allows you to track topics (no limit to the number of topics you select) you might want to select for future action plans. Use the 'future action plan' form to select the topics that you would like to implement in your next action plan.

### Future action plan

- Form is pre-populated with the recommended topics from your initial assessment results, but you can change these topics to suit your needs; there is no limit to the number of topics you select as it is simply a visual of possible future action plan topics
- This feature is available when your action plan status is 'in progress' or 'pending closure'
- Once your action plan status is 'closed', you can create your next action plan with these topics marked for easy action plan creation - this feature does not pre-select your topics for the next action plan, it simply shows visually the topics you pre-selected

### Using Future Action Planning

1. To access this planning tool, select the "future action plan" button at the far right of your dashboard.



Future action plan

2. This is where you control what topics will have the recommendation stars beside them for future action plans.



## Future Action Plan

Use this form to select the topics that you would like to implement in your next action plan. Please note, this form will be pre-populated with the recommended topics from your initial assessment results, but you can change these topics to suit your needs. Once your achievement report for the current year is generated, you will be able to create your next action plan with these topics marked for easy action plan creation

Topics	Selected Topic(s)
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">                     Level 1 - Foundation <span style="float: right;">^</span> </div> <input checked="" type="checkbox"/> Leadership and commitment <span style="float: right;">v</span> <input type="checkbox"/> Health and safety responsibility <span style="float: right;">v</span> <input type="checkbox"/> Communication <span style="float: right;">v</span> <input type="checkbox"/> Health and Safety Participation <span style="float: right;">v</span> <input checked="" type="checkbox"/> Injury, illness and incident reporting <span style="float: right;">v</span> <input type="checkbox"/> Incident investigation and analysis <span style="float: right;">v</span> <input checked="" type="checkbox"/> First aid <span style="float: right;">v</span> <input checked="" type="checkbox"/> Recognition of hazards <span style="float: right;">v</span>	<b>Level 1 - Foundation</b> Leadership and commitment <span style="float: right;">-</span> Injury, illness and incident reporting <span style="float: right;">-</span> First aid <span style="float: right;">-</span> Recognition of hazards <span style="float: right;">-</span> Risk assessment <span style="float: right;">-</span> Control of hazards <span style="float: right;">-</span> <b>Level 2 - Intermediate</b> Competency <span style="float: right;">-</span> Health and safety training <span style="float: right;">-</span> Legal and other requirements <span style="float: right;">-</span> Health and safety accountabilities <span style="float: right;">-</span> Emergency prevention and preparedness <span style="float: right;">-</span>

There is no limit to the number of topics you select.

3. To add a recommended topic select the checkbox on the left.
4. To remove a recommended topic use the “-“ on the right under **Selected Topic(s)**
5. When you are satisfied with the selection, use the “save” button at the bottom to update your recommended topics for your next action plan.



6. You may return to make changes using the “future action plan” button on your dashboard while your action plan is “in progress” or “pending closure”.

**Please note:** This feature is no longer available once your action plan is “Closed” as you will then be able to select your topics (maximum 5) for your next action plan.

**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.