



AODA POLICY AND TRAINING MODULE

Retirement Life Communities Consulting Inc. tools and resources to support accessibility in our retirement residences.

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Purpose

All retirement homes in Ontario must meet the standards for accessibility applicable to their organization which are set out under the Accessibility for Ontarians with Disabilities Act, 2005 (AODA). This toolkit will outline the requirements of the legislation and provide resources to assist operators in assessing and enhance their accessibility. Note that this toolkit serves as an educational resource only; legal advice should be sought if you are unsure whether specific requirements of the Act apply to your organization following review of this document.

Overview of the AODA and Human Rights Code

The AODA aims to identify, remove and prevent barriers for people with disabilities. The Act became law on June 13, 2005 and applies to all levels of government, non-profits, and private sector businesses in Ontario that have one or more employees (full-time, part-time, seasonal, or contract) – including retirement homes.

The AODA and Ontario Human Rights Code, 1990 (the Code) work together to promote equality and accessibility. The Code is a complaints-based legislation that addresses discrimination. It prohibits actions that discriminate against people based on a protected ground in a protected social area. What this means is that individuals cannot be discriminated against in areas like housing, employment and services for factors such as their ethnic origin, sex, or if they have a disability.

The AODA and the Code both use the same definition of disability, but they also have some important differences. Under the Code, when a person with a disability needs accommodation, there is a duty to accommodate to the point of undue hardship. This means organizations may need to provide an individualized response to an accommodation request; the toolkit will speak to this in more detail.

The AODA does not replace or affect legal rights or obligations under the Code and other laws relating to the accommodation of people with disabilities. This means that the Code, or other legislation, may require additional accommodation measures that go beyond or are different from the AODA. If there is a conflict between the AODA or an accessibility standard and any other provincial law, the final authority is the law that gives people with disabilities the highest level of accessibility related to goods, services, facilities, employment, accommodation, buildings, structures or premises.

Many people think of disabilities as noticeable physical disabilities, such as someone using a wheelchair. However, not all disabilities are visible, and you cannot always tell who has a disability. Disabilities can include physical limitations and mental health, cognitive or intellectual development, learning, hearing, or vision disabilities. They can also include epilepsy, substance addictions like alcoholism, environmental sensitivities, and disabilities that may arise from workplace injuries. Disabilities themselves are not a barrier, but barriers exist that can exclude people with disabilities. These include physical, information and communication, systemic or attitudinal barriers.

This toolkit will speak to retirement homes' duty to meet the standards for accessibility.

References:

[Ref A 1.13 Integrated Accessibility Standards] – *External Document*

[Ref A 1.14 Customer Service Standards] – *External Document*

Accessibility for Ontarians with Disabilities Act, 2005

<https://www.ontario.ca/laws/statute/05a11>

Human Rights Code, 1990

<https://www.ontario.ca/laws/statute/90h19>

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Introduction to the Integrated Accessibility Standards

In addition to general requirements, the Integrated Accessibility Standards (O. Reg. 191/11) under the AODA sets out five accessibility standards that were designed with the intent to create a barrier-free and accessible Ontario by 2025. These are: (i) Information and Communications; (ii) Employment; (iii) Transportation; (iv) Design of Public Spaces; and (v) Customer Service.

Purpose of the Standards:

- i. **Information and Communications** – To help organizations make their information accessible to people with disabilities.
- ii. **Employment** - To help make hiring and employee support practices more accessible.
- iii. **Transportation** - To make it easier for everyone to travel in the province.
- iv. **Design of Public Spaces** - To help organizations make new and redeveloped outdoor public areas accessible.
- v. **Customer Service** – To help remove barriers for people with disabilities so they can access goods, services or facilities.

This toolkit will focus on three of the five standards, specifically Employment, Design of Public Spaces, and Customer Service.

It is important to note that the regulation involved a gradual phase-in of the five standards with varying requirements and timelines for compliance. Refer to **A 1.13.3** noted below for a full outline of timelines for meeting compliance; all but one requirement have now been rolled out (i.e. specific website requirements by 2021 – refer to the Government of Ontario [website](#) for details). Also of importance is the continued requirement for AODA compliance reporting. Every three years, non-profits and businesses with 20 or more employees must complete a report with the Ontario Government confirming their compliance with the AODA. The last reporting deadline was December 31st, 2017; the next reporting deadline is December 31st, 2020 (See Government of Ontario reference below for assistance with report completion).

References:

- [Ref: A 1.12 Integrated Accessibility Standards] – *External Document*
- [Ref: A 1.12.1 Multi-Year Accessibility Plan] – *External Document*
- [Ref: A 1.12.3 AODA Compliance Deadlines for Private Sector Organizations] – *External Document*

O. Reg. 191/11: Integrated Accessibility Standards
<https://www.ontario.ca/laws/regulation/110191>

Government of Ontario (2018). Completing Your Accessibility Compliance Report
<https://www.ontario.ca/page/completing-your-accessibility-compliance-report>

Accessibility Ontario - How to comply with the Integrated Accessibility Standards Regulation
<https://www.ontario.ca/document/how-comply-integrated-accessibility-standards-regulation>

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Employment Standard

INTRODUCTION

Over 15% of Ontario's population has a disability and that number will grow as the population ages (Ontario Human Rights Commission, n.d.). The AODA Employment standard centres around making accessibility a regular part of finding, hiring and supporting employees with disabilities. Note that the standard only applies to employees, however retirement homes should ensure volunteers and independent contractors, as applicable, are trained to meet the requirements.

Standard Requirements by Business Size

| Requirements | 1-49 Employees | 50+ Employees |
|---|-----------------------|---------------|
| Accessible hiring practices | X | X |
| Informing employees of supports | X | X |
| Accessible formats and communication supports | X | X |
| Workplace emergency response information | X | X |
| Process for creating individual accommodation plans | <i>Not applicable</i> | X |
| Return to work processes | <i>Not applicable</i> | X |
| Performance management, career development and job changes (if they are offered at the workplace) | X | X |

EMPLOYMENT STANDARD CHECKLIST

General

- Do you have a policy that speaks to your hiring practices being accessible for people with disabilities?

Recruitment/Selection/Assessment

- Do you notify the public and employees of the availability of accommodation for job applicants during the recruitment process (verbally, or in writing in application forms or job postings)?
- Do you tell job applicants when they are selected for an interview that accommodation will be provided if needed?
- If an applicant requests accommodation, do you consult with the applicant and provide or arrange for the provision of a suitable accommodation in a manner that takes into account the applicant's accessibility needs?

Notice to Successful Applicants

- Do you ensure that, when making job offers, you notify the applicant of your policies on accommodating employees with disabilities, including who they can speak with if they wish to arrange an accommodation?

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Informing Employees of Supports

- Do you Inform all employees of your policies on supporting employees with disabilities, including accommodating an employee’s accessibility needs due to a disability (e.g. posters, staff emails, brochures)?
- Do you provide employees with updated information whenever there is a material change to applicable job accommodation policies?

Accessible Formats and Communication Supports for Employees

- Do you, upon receiving a request for accommodation, consult with the employee with a disability to provide the most appropriate accessible formats (e.g. large print, recorded audio) and communication supports (e.g. sign language, reading out loud) for job-related information like policies and bulletins?

Workplace Emergency Response Information

- Do you provide accessible emergency information to staff when you become aware an employee may need accommodation in an emergency?
- Do you provide individualized workplace emergency response information for employees with disabilities?
- If the individualized emergency response involves designating a person to assist the employee with a disability during an emergency, do you obtain the employee’s consent to share the information with the designated person?
- Is individualized workplace emergency information reviewed when the employee changes work locations, when you review the employee’s accommodation needs, and when general emergency response policies are reviewed?

Individual Accommodation Plans (*50+ employees only)

- Do you have a written process for the development of individual accommodation plans for employees with disabilities?
- Does the written process include:
 - How an employee can participate in the development of their individual accommodation plan?
 - How an employee is assessed on an individual basis?
 - How an employee can request an evaluation by an outside expert at their expense to assist in determining *if* accommodation can be achieved and if so, *how* it can be achieved?
 - How a unionized employee can ask for a representative from their bargaining agent OR how a non-unionized employee can ask for a representative from the workplace to participate in the development of the accommodation plan?
 - How you will protect the privacy of employee’s personal information?
 - When and how the accommodation plan will be reviewed and updated?
 - How you will tell an employee that their individual accommodation plan has not been accepted?
 - How you will provide the accommodation plan in a format that takes into account their needs?

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- Reference “Sample Individual Accommodation Plan Process” appendix 1

Return to Work Process (*50+ employees only)

- Do you document a return to work process for employees absent from work due to a disability and who require disability-related accommodations in order to return to work?
- Does the return to work process outline the steps you will take to facilitate the employee’s return to work using their documented individual accommodation plan?

Performance management

- Do you take into account the needs of employees with disabilities, as well as individual accommodation plans, when applying your performance management process?

Career development and advancement

- If you offer an employee with a disability the opportunity for career development and advancement, do you provide the accommodations needed to help them succeed (e.g. training and mentoring in an accessible format)?

Redeployment (Job Changes)

- If you reassign or redeploy an employee with a disability as an alternative to laying them off, do you take their needs into account, making sure to transfer their accommodation plan and supports upon reassignment?

Accessible Interviewing Checklist

Location of the interview:

- Is your office accessible to an individual who uses a walker or wheelchair? If not, here are a few tips:
 - If your residence has multiple floors, consider scheduling your interview on the main floor in a room. Also, look at using a meeting spot close to the entrance that is large enough for a person who uses a wheelchair or walker.
 - Clear pathways to ensure the individual can move freely through the building to the meeting spot
 - Consider providing additional room to store a wheelchair or walker if a person with a disability prefers to use an office chair while sitting with you for an extended period

Format of the skills assessment tests:

- Are your assessment tests accessible to an applicant with a disability? Do the tests allow a candidate to demonstrate their knowledge and skills? (Think about sharing the questions in advance to give them time to consider their response)

Room set-up for in-person interviews:

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- Is your interviewing room set-up accessible? Is it brightly lit, with minimal distractions?

Interviewing timelines:

- Can an individual with a disability perform in the interview within the timelines expected? (Time restrictions can be stressful, so consider stretching your time allowances to let individuals show their best qualities)

Paperwork:

- Are your forms and paperwork accessible for people with vision loss or a learning disability? Consider alternate formats, like large-print forms or assign a staff member to help the applicant with a disability by reading a form out loud, using sign language, etc. (The use of a support person may also be appropriate in this example)

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FAQs

Q. Do we have to comply with the AODA if we operate in Ontario but our head office is elsewhere?

A. Any organization with one or more employee located in Ontario) and that also has other offices outside Ontario is required to comply with the AODA.

Q. In what circumstances would an accommodation request be denied by an employer, and what should the next step be?

A. Under the Ontario Human Rights Code, employers have a duty to accommodate persons with disabilities unless an accommodation would cause undue hardship. The Code prescribes three considerations: (i) cost; (ii) outside sources of funding, if any; or (iii) health and safety requirements, if any. Under Section 28 of the AODA Employment Standard employers must inform the employee of the reasoning behind the accommodation request being denied. Employees should have a chance to respond to the denial of accommodation. If the employee and employer are unable to come to terms, a third party could be brought in to mediate (e.g. a lawyer).

Q. Are there resources or organizations that can help employers determine and implement disability-related accommodations for employees?

A. The Government of Ontario offers many resources on accessible workplaces through their website: <https://www.ontario.ca/page/accessible-workplaces>. The Conference Board of Canada Accessibility toolkit is an additional helpful resource: <https://www.conferenceboard.ca/accessibility/toolkit.aspx>.

(Source: Government of Ontario, *The Conference Board of Canada*)

References:

[Ref: A 1.12 Integrated Accessibility Standards]

[Ref: A 1.12.2 Guidelines: Procedure for Creating Individual Accommodation Plans ("IAP") and Return to Work Plans ("RWP") – *(Sample form)*]

ORCA Tutorial "How to Promote Accessibility Compliance in Employment Standards"

Access Forward Training Module: Employment Standard Module

<https://www.accessforward.ca/front/employment/>

Ontario Human Rights Commission (n.d.). By the Numbers: A statistical profile of people with mental health and addiction disabilities in Ontario.

<http://www.ohrc.on.ca/en/book/export/html/15291>

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Design of Public Spaces Standard

INTRODUCTION

Accessible public spaces include specific features that make it easier for everyone, including people with disabilities, seniors and families, to use public spaces. The Ontario Building Code sets the technical requirements for retirement home building constructions like building entrances and washrooms. The Design of Public Spaces (DOPS) standard under the AODA primarily addresses outdoor spaces including **parking, outdoor eating areas, and paths of travel**. It also includes the maintenance of public spaces and addresses indoor service-related elements, specifically **service counters and waiting areas with fixed seating**. For example, a retirement home reception area is considered a “public space” under the AODA; the legislation does not speak explicitly to other areas of a retirement home (e.g. dining room, library, etc.) so organizations would not have requirements to make these spaces accessible. However, it is always advisable to consult legal counsel to confirm your organization’s requirements.

The requirements under the Design of Public Spaces Standard apply to any **new construction or planned significant alternations/redevelopment of existing public spaces**. Unplanned changes to existing public spaces to meet the standard (retrofits) are not required. Examples of redevelopment include moving a waiting area to a new location within a building, or replacing the tables in an outdoor eating area. The organization that constructs or redevelops the public space must comply with the requirements. This does not mean that a person or organization hired to physically construct the space is responsible for compliance. If a retirement home decides to build an outdoor eating area, for example, then the retirement home is responsible for ensuring that the space meets the DOPS requirements. Planners, architects, contractors or engineers who are hired to construct the space would not be responsible for ensuring the work being completed adheres to the standard. Depending on the project, consultation with an architect or other planning professional should begin as early as possible when planning a redevelopment of or new public space for them to assist with creating an accessible design. The GAATES Illustrated Technical Guide to the Design of Public Spaces noted in the References section provides details on design specifications.

If a retirement home has entered into a contract on or before December 31, 2012 to build a new or make planned significant alterations to an existing public space, and the contract does not meet the requirements of the standard, the requirements do not have to be met in honouring the contract. Despite this exemption, retirement homes are encouraged to meet the requirements of the Design of Public Spaces Standard wherever possible.

DESIGN OF PUBLIC SPACES STANDARD CHECKLIST

Note that this list of requirements is not exhaustive; refer to the regulation.

As noted in the introduction to this toolkit, if you are unsure of your organization’s compliance, or whether specific requirements of the standard apply to you, legal advice should be sought.

General

- Do you have a policy that speaks to accessible design of public spaces?

Accessible Off-street Parking

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- If you are/have plans to add to your current parking lot, or reconstruct the lot entirely, as applicable:
 - Are you providing accessible off-street parking in newly built/redeveloped parking areas for residents and visitors?
 - Is the appropriate parking signage posted (e.g. "van accessible") as applicable?
 - Are the appropriate access aisles constructed to provide users with space to transfer into and out of their vehicles?

Exterior Paths of Travel (*50+ employees only)

- If you have areas along the exterior path of your residence that are accessible to the public that you are/have plans to redevelop, as applicable:
 - Are all new/redeveloped outdoor sidewalks and walkways firm, stable and slip-resistant?
 - Are all additional accessible construction elements met (i.e. ramps and slopes, rest areas, etc.)?

Service in Public Spaces

- If you are, or are planning to redevelop service counters, fixed queuing guides, and/or waiting areas accessible to the public, as applicable:
 - Do you have at least one accessible service counter for each service that accommodates people with a mobility aid, such as a wheelchair or scooter?
 - If you have multiple service counters and queuing lines, are they placed far enough apart to allow people using mobility devices to pass through them?
 - If your waiting area(s) has seating fixed to the floor, are there dedicated spaces (at least 3% of the total number of seating, 1 seat minimum) for people who use mobility devices, such as wheelchairs?

Outdoor Public Eating Spaces (*50+ employees only)

- If you provide outdoor public eating spaces that are intended for use by the public as a place to consume food, as applicable:
 - Do you provide accessible tables that people using mobility devices can use (20% accessible; 1 table minimum)?
 - Is the area approaching and surrounding the accessible tables level, firm, and stable so that a person using a mobility device can get to the table and move up to and around the table?

Recreational Trails

- If you provide recreation trails to the public and are constructing a new recreational trail or performing major renovations to an existing recreational trail, as applicable:
 - Have you consulted with the public and people with disabilities when creating or

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changing recreational trails?

- Does your recreational trail follow technical requirements (e.g. slope of trail, need for and location of ramps, etc.)?

Beach Access Routes

- If you provide a beach access route (a public route that may be permanent or temporary), as applicable:
 - Are all accessible construction elements met (e.g. minimum clearance width, changes in level, maximum slope, etc.)?

Outdoor Play Spaces (*50+ employees only)

- If you provide an outdoor play space (including play equipment and structures, and natural features like logs or water intended for play) that is new or has been redeveloped, as applicable:
 - Have you consulted with the public and people with disabilities to identify the needs of users of outdoor play spaces in the local community?
 - Have you included accessibility in the design of the play space?

Maintenance (*50+ employees only)

- If applicable, do you have a multi-year accessibility plan with documented procedures (considering the purpose, frequency of use and how users would be affected by poor working conditions) for:
 - Preventative and emergency maintenance of the accessible elements in your public spaces required by the standard
 - Temporary disruptions to your accessible public spaces when accessible elements in the public spaces required by the standard are not working

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FAQs

Q. Do I need to retrofit my reception counter if it does not meet the accessible design requirements under the AODA?

A. If you are not planning to make significant changes to the reception area like moving the location of it, or building a new reception area, you do not need to make changes to the existing design.

Q. When would the outdoor public eating spaces requirement apply to an organization?

A. If your outdoor public eating area is open to the public, such as residents' family or friends, the space would then fall under the requirements of the DOPS standard under the AODA.

Q. For the requirement to consult with the public and persons with disabilities regarding the development of recreational trails and outdoor play spaces, at what point in the project should you hold consultations?

A. Depending on the project, you should consult as early as possible in the planning process or once the design phase is complete, prior to the construction of the project.

(Source: *Government of Ontario*)

References:

[Ref: ORCA Policy A 1.12 Integrated Accessibility Standards] – *External Document*

ORCA Tutorial "How to Promote Accessibility Compliance in Customer Service and Design of Public Spaces"

Ontario Building Code (O. Reg. 332/12)
<https://www.ontario.ca/laws/regulation/120332>

Access Forward Training Module: About the Design of Public Spaces Standard
<https://www.accessforward.ca/publicSpaces/about-design>

Government of Ontario (2017). How to Make Public Spaces Accessible.
<https://www.ontario.ca/page/how-make-public-spaces-accessible>

GAATES Illustrated Technical Guide to the Design of Public Spaces.
<https://qaates.org/DOPS/loc.php>

Ontario Municipal Social Services Association (OMSSA) (2013). Guide to Accessible Public Engagement
https://www.omssa.com/docs/OMSSA_Guide_to_Accessible_Public_Engagement.pdf
Customer Service Standard

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INTRODUCTION

When providing customer service, staff must remember that everyone, including those with a disability are entitled to the same services. All staff must comply with the principles of the AODA when providing customer service, which affect everyday decisions. These principles are:

- 1. **Dignity** – People with a disability are as valued and as deserving of effective and full service as any other person and should be treated in a manner consistent with that fact.
- 2. **Equality of Opportunity** – People with a disability should be given an opportunity equal to that given to others to obtain, use and benefit from services and facilities
- 3. **Integration** – Whenever possible, people with a disability should benefit from services and facilities in the same place and manner as others, free from separation and barriers. Alternative measures might be necessary.
- 4. **Independence** – Services and facilities should, wherever possible, be provided in a way that respects the independence of persons with a disability. Always ask for consent prior to assisting.

CUSTOMER SERVICE STANDARD CHECKLIST

General

- Do you have a policy that speaks to serving people of all abilities?
- Do you make reasonable efforts to ensure that your policies are consistent with the key principles of dignity, equality of opportunity, integration and independence?

Accessibility at Premises

- Do you list in your policy any measures your company offers or is prepared to offer (e.g. assistive devices, offered; assistance of a staff person to complete a form; screen readers for a website; a chair for waiting in line if standing for a long period of time, etc.)?

Assistive Devices

- Do you allow people to use their own personal assistive devices, along with any other assistive tools or services you offer?
- Do you train staff on how to use assistive devices available in your building, as applicable?
- If there is a physical, technology or other type of barrier that prevents the use of an assistive device on the premises, do you make efforts to provide an alternative means of assistance to the person with a disability?

Communication

- Do all staff and volunteers communicate with people with a disability in a way that takes into account their disability and needs?

Service Animals

- Do you welcome service animals in those areas of your business that are open to the public?
- In situations where a service animal is prohibited by law, do you provide another way for the person to

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access your goods, services or facilities?

Support Persons

- Do you let people with disabilities bring their support persons with them while in areas open to the public or third parties?
- Do you post a notice letting people know ahead of time what, if any, admission fees are charged for a support person?
- When, in limited situations, you might require a person with a disability to be accompanied by a support person for health or safety reasons, is the decision made by consulting with the person and considering available evidence?
- If it is determined that a support person is required to accompany a person with a disability, do you waive any fee or fare for the support person, if one exists?

Notice of Temporary Disruptions

- Do you provide notice of disruption of service when facilities or services that people with disabilities usually use are temporarily unavailable (for example, an elevator or accessible washroom that is out of service)?
- Does the notice include the reason for the disruption, how long it will last and any alternatives, if available?

Training and Records

- Do you train all employees and volunteers on providing accessible customer service and how to interact with people with various types of disabilities? **The training is appropriate for Staff and Volunteers, and others that would request the training.**
- Is training completed as soon as possible after an employee or volunteer joins your company? **Yes**
- Does anyone involved in developing policies, practices, and procedures (e.g., managers) receive training? **Yes**
- Do you keep a record of training provided (applicable to 50+ employees only)? **Yes**

Feedback Procedure

- Do you have a feedback process that allows customers/residents with disabilities to comment on their experience?
- Do you make information about your feedback process available to the public?
- Do you ensure your feedback process is accessible by providing accessible formats or communication supports on request?

Format of Documents

- Do you make your policy and any other documentation required by the standard available to any member of the public upon request?
- Do you post notice of the availability of your policy and other documentation in a conspicuous place, posting it on your website, or by another method reasonable in the circumstances?

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Documentation to be Made Available

- If a person with a disability needs a document in an accessible format, or help to communicate with you, do you consult with the person to provide the format or support that will meet their needs?
- Do you provide requested documents in a timely manner and in a manner that takes into account a person's disability?

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FAQs

Q. How often do we need to train our staff and volunteers?

A. Organizations are required to train existing and new people at the organization as soon as practicable. You also need to provide training whenever changes to your accessibility policies are made and, possibly if someone changes their job duties.

Q. I have taken AODA training at my office. Do I need to retake this training as a volunteer outside my workplace?

A. Yes, you are required to take training in each of your jobs, as the training may be different and specific to the job duties or volunteer responsibilities.

Q. What if another company provides some of our services?

A. As an organization with obligations under the AODA, you must ensure that the other organizations or third parties providing goods or services on your organization's behalf are trained under the AODA. For example, you may contract or pay another company to provide billing and collections services, or delivery and installation services, on your behalf. Organizations are not required to provide the training directly and it is up to the organization to determine how they ensure that staff of contractual parties have been trained to meet the AODA requirements.

Q. Who must take care of a service animal while its owner is accessing goods or services?

A. It is the responsibility of the owner of the service animal to provide for the maintenance and care of the service animal while accessing an obligated organization's goods or services.

(Source: Government of Ontario)

References:

[Ref: ORCA Policy A 1.13 Customer Service Standards] – *External Document*

- Sample Policy Template – Feedback Process / Form
- Accessible Customer Service Feedback Form / Response Form
- Customer Service Feedback Tracking Log
- Accessible Documentation (Tips)
- Sample Policy Template – Notice of Service Disruption / Sample Template
- Sample Policy Template – Service Animals
- Sample Policy Template – Support Persons
- Customer Service Standard – Training Log
- Instructions for Filing an Accessibility Report

ORCA Tutorial "How to Promote Accessibility Compliance in Customer Service and Building Design"

Access Forward Training Module: Customer Service Standard

<https://accessforward.ca/front/customerService/>

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Sample Individual Accommodation Plan Process

is committed to accommodating

people with disabilities and will use the following process to identify and meet employee accommodation needs.

1. Recognize the need for accommodation

Accommodation can be:

- requested by the employee
- identified by the employee's manager or hiring manager

2. Gather relevant information and assess individual needs

The employee is an active participant in this step

- Information will be collected on the employee's functional abilities, not the nature of the employee's disability
 - The employee's personal information, including medical information, is kept secure and dealt with in a confidential manner. It will only be disclosed to individuals who need it to perform the accommodation process.
- The employee and his/her manager will work together to find the most appropriate accommodation
 - A medical or other expert may be engaged (at the company's expense) to help determine if/how the employee's needs can be accommodated
 - The employee may ask a bargaining agent or other workplace representative to participate in the process

3. Write an individual accommodation plan

After identifying the most appropriate accommodation(s), the details will be documented in a written plan, including:

- What accommodation(s) will be provided
- How to make information accessible to the employee, including accessible formats and communication supports
- Employee emergency information and/or emergency response plan (if applicable)
- When the plan will be reviewed and updated

The manager will give the employee in an accessible format (if required), a copy of the individual accommodation plan, or written reasons for denying accommodation.

4. Implement, monitor and update the plan

After implementing the accommodation plan, the employee and his/her manager will monitor and review the plan to ensure that it is effective. Formal reviews and updates will take place on the mutually agreed upon, predetermined schedule in the employee's accommodation plan. If the accommodation is no longer appropriate, the employee and the manager will reassess the situation (step 2) and update the plan.

The accommodation plan will also be reviewed and updated if:

- the employee's work location or position changes
- the nature of the employee's disability changes

Sample Individual Accommodation Plan

Confidential when completed

Employee Information

| | |
|--------------------|------------|
| Last Name | First Name |
| Title / Department | |

Manager Information

| | |
|--------------------|------------|
| Last Name | First Name |
| Title / Department | |

Accommodations

| | | | |
|-------------------------|-----------------------|------------------------------------|--------------|
| Start Date (yyyy/mm/dd) | End Date (yyyy/mm/dd) | Next plan review Date (yyyy/mm/dd) | Or Frequency |
|-------------------------|-----------------------|------------------------------------|--------------|

Limitations

List any functional limitations that the employee experiences, how it affects different aspects of his/her job and if each task is an essential part of the role.

1. Limitation

Tasks / activities affected

Essential job requirement?

Yes No

Accommodations

Using the list of tasks from the limitations section above, identify what types of accommodation or support would help the employee accomplish the task. List a strategy or tool that will provide that accommodation.

1. Task

What must the accommodation achieve?

Accommodation strategy

Implementation

List the actions required to achieve the accommodation(s) identified in the prior section.

1. Action

Assigned to

Due Date (yyyy/mm/dd)

Date Completed (yyyy/mm/dd)

Information sources

Identify and include the contact information for any experts consulted when building the plan (e.g., human resources manager, family doctor, specialists)

| | |
|---------------|--------------------------|
| 1. Last Name | First Name |
| Title/Role | |
| Email Address | Telephone Number ext. |

Related documents

Attach any additional documents required to support the employee.

- Employee emergency plan (if applicable)
- Accessible format of the individual accommodation plan (if needed)
- What type(s) of accessible formats and/or communications support the employee needs (if requested)
- Return to work plan (if applicable)
- Other (specify): ▼

Comments / Notes

Use this section for any additional information (e.g. details of alternative work arrangements, budget code for accommodation costs, etc.)

Signature

| | |
|----------------------|-------------------|
| Employee's Signature | Date (yyyy/mm/dd) |
| Manager's Signature | Date (yyyy/mm/dd) |

* This sample accommodation plan is for informational purposes only and should not be taken as legal advice. You should contact a lawyer for advice for your particular set of facts or circumstances.