**User setup**

The WSIB creates program provider user access based on the information the user provides. This includes the user’s email address, first name, and last name. Program providers can request to add/remove users by sending a note with the above information to the email address: health\_and\_safety@wsib.on.ca.

User accounts created by the WSIB will receive an initial password notification. Use the Google Chrome internet browser for the best experience.

1. Visit the login page: https://healthandsafety.wsib.ca/user/login

2. Enter the email address provided to the WSIB (step above) and the initial password: Safety1!

3. Upon successful login, you will see the home page, with the ‘View’, ‘Edit’, ’Dashboard’ and ‘Email Notifications’ buttons displayed.

4. Change the initial password by clicking on the ‘Edit’ button. Enter Safety1! as the current password, and enter and save your new password in the ‘password’ and ‘confirm password’ boxes.

5. Click on the ‘Save’ button. Your new password is now active.

**Dashboard**

Click on the ‘Dashboard’ button to access the following tables:

1. **Evidence for review:** Lists employers who have uploaded and submitted their ‘evidence story’ and ‘evidence file(s)’ for one or more of their selected health and safety topics and is waiting for you to review.
* Click on the ‘View’ button to access the employer’s action plan page with their approved action plan topics.
* Click on the ‘Edit’ button to begin the evidence review process. A process bar will appear along the top of the screen with the following sections:
	1. **Topic selection:** Lists employers’ approved topics and the action plan ‘expiration date’. The expiration date is automatically set to 12-months from the date the action plan was approved by the provider. To revise the action plan expiration date, see the instructions at the end of this document. This page also:
		+ Indicates whether or not the employer is scoping their action plan topics and the scoping percentage.
		+ Contains the ‘topic selection document’ uploaded by the employer (optional).
	2. **Implementation model:** Each employer must select the model they will use to implement their topic(s). Employers can upload one ‘topic implementation document’ to support the selected model. If the employer has selected ‘other provider-approved model’, they must use this area to upload their evidence story. To view the ‘topic implementation document’, click on the uploaded file name (hyperlinked in blue text) to download the file to your C drive (you cannot double click the file name to view the document).
	3. **Evidence story:** Employers who selected WSIB's "Five Steps to Managing Health and Safety" or "Plan-Do-Check-Act" as their implementation model can use this section to explain how they implemented the topic in their workplace. Alternatively, if the employer uploaded their evidence story in the implementation model section, they can leave this page blank. The status beside each topic is the same as the status in the ‘evidence upload’ tab as outlined in section (d).
	4. **Evidence upload:** Employer’s evidence files upload status as defined below:
		+ **Draft:** Topic (evidence story and evidence file(s)) is being worked on by the employer and not ready for provider review.
		+ **Ready for provider review:** Topic (evidence story and evidence file(s)) submitted to the provider for review.
		+ **In progress**: Topic (evidence story and evidence file(s)) submitted by provider to the WSIB for validation.
		+ **Complete:** The WSIB validator has completed their desk validation of the topic and the employer’s evidence sufficiently supports the topic requirements and demonstrates the topic has been implemented in their workplace.
		+ **Incomplete:** The WSIB validator has completed their desk validation of the topic and the employers evidence shows insufficient proof that the topic has been implemented in their workplace.
		+ **Additional evidence required:** The words ‘additional evidence required’ may appear beside a topic that is in ‘Draft’ or ‘Ready for provider review’ status. The WSIB validator requires additional evidence because the employer’s evidence is insufficient and does not demonstrate the topic has been implemented in their workplace. In the evidence story and evidence upload tab, the validator will include the reason additional evidence is required.

**Review the employer’s evidence story and evidence file(s) for each topic:**

On the ‘evidence story’ page, for each topic that has the status ‘Ready for provider review’ beside the topic name:

* Click on ‘Edit’ button beside the topic name to view the employer’s evidence story for that topic. If this area is blank, ensure the employer has uploaded their story in the implementation model section.
* On the ‘evidence upload’ page, click on the ‘Edit’ button beside the topic name. Click on the drop down arrow beside the verbiage ‘View evidence files’ to access the evidence file(s). Click on the uploaded file name (hyperlinked in blue text) to download the file to your C drive (you cannot double click the file name to view the document).
* If the employer’s evidence supports topic completion, submit the topic to the WSIB for validation:
* Click on the ‘View action plan’ button at the top of the page and in the comment section of the action plan page, ensure the employer has:
	+ Included the name and contact information for the employer rep the WSIB validator should reach out to should they have a question regarding the evidence for the topic.
	+ If the topic is ‘Control of Hazards’, the hazard pertaining to this topic is noted.
	+ Click on the back arrow at the top of the page.
* On the ‘evidence upload’ page click the ‘Edit’ button beside the topic name. Select the checkbox ‘Submit evidence for review’ and click on the blue ‘Update evidence’ button. If there is more than one topic, follow this process for each topic you wish to approve and submit to the WSIB for validation
* Scroll to the bottom of the ‘Evidence upload’ page and click ‘Save.’ You will be taken to an ‘Evidence Confirmation’ page to review before completing your submission to the WSIB.
* Review this page and the evidence documents for a second time, if necessary, and click on the ‘Submit’ button.
* You should notice that the status for the topic(s) submitted to the WSIB for validation has changed to ‘In progress’.
* If the employer’s evidence does not support topic completion, work with member to address gaps identified:
	+ On the ‘evidence upload’ page, click on ‘Edit’ button beside the topic name.
	+ Change the ‘Evidence status’ by clicking the drop down arrow and changing ‘Ready for provider review’ to ‘Draft’ status. Click on the blue ‘Update evidence’ button and then ‘Save’ at the bottom of the screen. This puts the topic back into ‘Draft’ status so that the employer can upload new evidence files and/or revise their evidence story.
	+ Have a discussion with employer or use the comments section on the action plan page to indicate what additional and/or other evidence could be submitted to support topic completion.
	+ After the discussion, the employer can revise the evidence story and/or upload new evidence (maximum 5 files) and re-submit the topic again for your review.

**Note:** As a provider, you have the ability to revise the evidence story and change the evidence files (delete or add evidence files). You share the exact same view as the employer in the topic selection, implementation model, evidence story and evidence upload tabs. The only difference is you have the ability to submit the topic to WSIB for validation.

2. **Businesses:** Lists employers (including their WSIB account number) registered with you the provider. The number in the top right corner of the table, is the total number of employers registered with you. In the ‘Business search’ box you can search for an employer using their name or account number.

This table also contains:

1. Employer’s assessment status:
* The assessment is not started
* The assessment is started, but not completed

  The assessment is completed

1. The level of employer as determined by their assessment results:
* Level 1 – Foundation
* Level 2 – Intermediate
* Level 3 - Advanced
1. Employer’s action plan (selection of topics) status -
* **Incomplete:** The action plan has not been created; the assessment has not been completed by the employer or the assessment has expired.
* **Draft:** The action plan has been created but the employer has not yet submitted to the provider for review and approval.
* **Ready for review:** The action plan has been created and submitted to the provider for review and approval.
* **Approved**: The action plan has been approved by the provider.
* **In progress**: One or more action plan topics have been or are with the WSIB for validation.
* **Closed**:

**To view the list of recommended health and safety topics for an employer:**

* In the business table, click on an employer name. Scroll to the bottom of the page to the section titled ‘Recommended topics’ to view an employer’s recommended topics based on the assessment results.

**To view the action plan page and the topics selected by the employer:**

* In the businesses table, click on the ‘view’ button beside an employer’s name. This brings you to the action plan page and the list of topics selected by the employer appears on the right side of the screen under the heading ‘Topics’. Type your notes/comments into the ‘Add new comment’ section at the bottom of the screen. For example, comments may include discussion summaries between you and your provider as well as your rationale for the selection of health and safety topics. To return to the previous screen, click the back arrow at the top of the page.

**Approving an action plan:**

* In the Businesses table, use the filter by clicking on the arrow beside ‘Action plan status’ and select ‘Ready for review’, click on the ‘Apply’ button. This will bring up all employer’s waiting to have their action plan approved.
* Click on the ‘edit’ button on the far right of the employer’s name. The topic(s) they have selected are displayed in the ‘Selected Topic(s)’ table.
* Scoping implementation and percentage is also indicated on this page.
* If they have uploaded a ‘topic selection’ document (optional), click on the uploaded file name (hyperlinked in blue text) to download the file to your C drive (you cannot double click the file name to view the document).
* Click on the ‘View’ button to go to the action plan page and read any comments the employer may have given regarding the selection of their action plan topics and/or scoping. If they have selected ‘Control of Hazards’ topic, they should list the hazard in this section.
* Scroll down to the 'Change to' box and select 'Approved'. Click the ‘Save’ button.
* You will receive a confirmation message that the action plan has been updated.

**Not approving an action plan:**

There may be instances where the employer has submitted their action plan for approval but after discussion, both parties agree that the action plan topics should be changed. In this case, ask the employer to log into the digital platform, change their selected topics, and ‘Save’ their changes. Resubmit to you by clicking on ‘Edit’, scroll down to the 'Change to' box at the bottom of the page and select: 'Ready for provider review' and hit ‘Save’. You will receive a confirmation message that the action plan has been updated.

If an employer does not have the time or ability to change the topics, a provider user can make the changes on the employer’s behalf. Click on the ‘Edit’ button on the far right of the employer name. Topics can be added/removed from the selected topics box on the right and replaced with other topics from the dropdowns on the left. Scroll down to the 'Change to' box and select 'Approved'. Click on the ‘Save’ button. You will receive a confirmation message that the action plan has been updated.

**Changing the expiration date of an approved action plan**

* In your business table, click on ‘edit’ beside the employer name.
* You will be on the ‘Topic selection’ page.
* Change the action plan expiration date in the ‘Expiration date’ box.
* Click ‘Save and continue’ at the bottom of the page.
* You will receive a confirmation message that the action plan has been updated.

**Delete an approved action plan**

As a provider, you have the ability to delete an approved action plan. Reasons to do so include:

* A change in action plan topic(s) after the action plan has been approved.
* Employer wishes to apply ‘scoping implementation’ after the action plan has been approved.
* Employer working on more than one ‘control of hazards’ topic and action plan was approved before the digital tool allowed this topic to be selected more than once. Creating a new action plan will allow the employer to select ‘control of hazards’ up to 5 times. This provides space for the employer to submit up to 5 evidence files to support topic completion and write an evidence story for each hazard. The employer still needs to indicate the hazard(s) they are addressing in the comments section on the action plan page.
* Employer wishes to change their implementation model selection.

**Note: When you delete an approved action plan, the selected implementation model, the evidence story, or any uploaded evidence files is also deleted.**

**Steps for a provider to delete an action plan:**

* In the Dashboard, go to your ‘Businesses’ table, scroll to the employer and click on ‘view’, the action plan page is displayed.
* Open a Word document, cut and paste the topics that were selected, the original action plan expiration date, and all the comments.
* Click the ‘delete’ button.
* You will see a confirmation screen indicating that ‘This action cannot be undone’. Below this verbiage are two buttons: ‘Delete’ and ‘Cancel’.
* Once ready to proceed with action plan deletion, click ‘Delete’. You will receive confirmation that the action plan has been deleted.
* Go back to the ‘Businesses’ table in the dashboard and you will see that the employer’s action plan status has been reset to ‘Incomplete’.
* Contact the employer:
	+ Ask the employer to login, go to their dashboard, and click on ‘select action plan topics’.
	+ Ask the employer to select the revised set of topic(s). If the employer is scoping, click on the ‘scoping implementation’ indicator and add the scoping %.
	+ Under the ‘Save as’ drop down, ask the employer to select ‘Ready for review’.
	+ Ask the employer to ‘Save’.
* You should now see the employer’s action plan status marked as ‘Ready for review’ in your ‘Businesses’ table.
* In the comments box, paste the prior comments and the original set of topics from the Word document.
* Under ‘Save as’, select ‘Approved’ and ‘Save’. If required, change the expiration date of the approved action plan by following the steps above.

3. **Expiring Action Plans**: Once an action plan has been approved by a provider, evidence of topic completion must be submitted for validation to the WSIB within 365 calendar days (including the review of evidence by the provider prior to submission to the WSIB). This table lists employers whose action plan will be expiring who have not submitted all their topics for WSIB validation. Use the expiration date filter to view action plans expiring within 30, 60 or 90 days.

4. **Overall Statistics**: The number of employers listed in this table should match the number of employers listed in your business table. Lists all employers registered with the provider with filters for sector, region, size, and level. In the ‘Business search’ box you can search for an employer using their name or account number.

5. **Culture Survey**: Provides an overall summary of the culture survey results of employers enrolled with the provider.

* The number in the far right hand corner of the table represents the number of employees who have completed the survey.

6. **Recruitment List**: Lists employers with an active WSIB account number that have not registered with a provider. All providers have the same view of this section. Clicking on an employer’s name displays additional information about the

employer. The user can also filter the list by sector, region, and priority. ‘Priority’ is a convenient, single indicator that identifies employers that would benefit the most from the program. When an employer registers with a provider, the employer is removed from this section. It is not recommended to download the list from the digital portal.

**Email Notifications**

The default setting is ‘Subscribe’. If you wish to unsubscribe from these notifications, click on ‘Email Notifications’ then click on ‘Unsubscribe’ under ‘Email Notification Settings’ then click ‘Save’.

**Downloading information in tables**

Any table with beside the table name, can be downloaded into an excel file. Click on the arrow to export the file. Once complete, you will receive confirmation that the export is complete. You can open the file by clicking the file name at the bottom of your computer.

**Questions?**

Contact Workplace Health and Safety Services at 416-344-5533 or 1-800-387-0750 ext. 5533

or via email: Health\_and\_Safety@wsib.on.ca