Work Instruction: AODA Documented Individual Accommodation Plans	WI-18.1-C

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1.0 Purpose

In accordance with the *Integrated Accessibility Standards Regulation (IASR), Ontario Regulation 191/11, Part III – Employment Standard, Section 28 – Documented Individual Accommodation Plans* under the *Accessibility for Ontarians with Disabilities Act, 2005,* Ultra Manufacturing Ltd. will have in place a written process for the development of Documented Individual Accommodation Plans (IAP) for employees with a disability. These instructions are intended to define the requirements and procedure for Ultra Manufacturing Ltd. in the development of IAPs for employees with disabilities.

2.0 Principle

Ultra Manufacturing Ltd. will have in place a written process for the development of a Documented Individual Accommodation Plan (IAP) for employees with a disability. This process will include:

- The employee's participation in the development of the IAP;
- The means by which the employee is assessed on an individual basis;
- Identification of the accommodation(s) to be provided;
- Timelines for the provision of accommodations;
- Ultra Manufacturing may request an evaluation by outside medical or another professional, at the company's expense, to assist with determining accommodation needs, and how best to achieve accommodation;
- Employees may request the participation of a representative from the workplace, or a representative from their bargaining agent when applicable, in the development of the accommodation plan;
- The means by which the privacy of the employee's personal information will be protected;
- The frequency with which the IAP will be updated, and the manner in which this will be done;
- If an IAP is denied, the reasons for the denial will be provided to the employee;
- A format for the plan which takes into account the employee's disability needs;
- If requested, any information regarding accessible formats and communication supports provided; and
- Identification of any other accommodation that is to be provided.

3.0 Procedure

The following process shall be followed when any employee with a disability initiates a request for an Individual Accommodation Plan (IAP).

1. Following a request for an IAP, Human Resources (HR) will meet with the employee making the request to discuss the accessibility needs required. Together, HR and the employee will create an action plan for the evaluation and creation of the IAP in order to meet the needs of the employee.
2. This initial meeting will serve the purpose of fact finding, where the employee will provide information regarding their disability, and provide medical documentation in support of this claim. Ultra Manufacturing Ltd. will reimburse the employee for any medical documentation required to support the request, should Ultra Manufacturing Ltd. request evaluation by outside medical or another professional.
3. HR will arrange for an assessment of the employee's work area and job responsibilities in order to determine any barriers. This could include a walk through with HR, the employee, and other selected parties from the workplace if required, and/or an evaluation of the job description and duties. Sources outside the company may also be consulted to evaluate the accommodations required and whether the position and/or workplace can be accommodated for the requester's disability. This would be at the discretion and compensation of Ultra Manufacturing Ltd. If, following the assessment phase, it is determined the request is to be declined, HR will prepare and provide the requester with a letter of denial stating the reason for declining the request for an IAP.
4. If the employee would like to include a representative from the workplace to participate in the creation of their accommodation plan, they must provide the name and authorization of the person, including the reason for inclusion.
5. The contents and the reason for the IAP will be confidential and only shared with affected parties with the consent of the employee. Any parties that are privy to the information will be informed the information is confidential and included in Ultra Manufacturing Ltd.'s confidentiality policy.
6. When the terms of the IAP have been agreed upon, it will be documented and signed off on by both a representative of the HR department and the employee. The employee will be provided with a signed copy of the plan, and the original will remain in the employee's personnel file located in the HR department.
7. The IAP will be revisited on an annual basis to ensure it still meets the needs of the employee. If there are any changes in the workspace and/or duties and responsibilities of the employee, the IAP will be revisited, as needed. When reviewed, both the employee and a representative from HR will participate and either make necessary adjustments or sign the document with the new date indicating approval. Updated medical documentation may be requested by the HR department at the time of review to ensure they are meeting any necessary requirements, and the employee will be reimbursed for all incurred costs. If, at the time of review, it is determined that the IAP is no longer required, then a letter stating such will be provided by the HR Department to the employee, and a copy placed in the personnel file.

8. If the original request is denied, HR will provide a written response indicating the denial, and the reason for the failed request in the IAP. A copy of the completed IAP will be provided to the employee and a copy will remain in the employee's file with the original request.
9. If required, the IAP can be provided to the employee in an accessible format, which takes into account their individual accessibility needs.
10. If required, the IAP can include an Individual Emergency Response Plan.

4.0 Responsibilities

Both Ultra Manufacturing Ltd. and the employee have responsibilities that need to be met, from the initial request for an IAP, to the finalization and continuous review of said plan. They are as follows:

Employer Responsibilities:

1. Human Resources will respond to a request for an IAP as soon as is practicable.

2. Include the employee in all steps of the creation process for the IAP.

3. Inform the employee of all supporting documentation required for the claim, and provide timelines for submission of documentation.

4. Ensure reimbursement to the employee of all expenses incurred for medical documentation regarding their request.

5. Arrange the assessment of the job responsibilities and/or workspace of the employee. This includes arranging for and compensating any external sources for their expertise.

6. Accommodate the participation of another employee in the process upon the employee's notification.

7. Maintain the confidentiality of the employee's request, and any disclosed information, unless disclosure is deemed necessary.

8. If accepted, document the agreed upon IAP, and ensure both parties sign off prior to placing in the employee file.

9. Set follow up dates for review of the plan yearly, and ensure if any changes in the status of employment a review is done as soon as practicable.

10. Acknowledge and confirm a denial of the request on the IAP document.

11. Ensure the employee's IAP is accessible in a format that meets their individual needs.

12. Ensure the employee receives copies of all documentation relating to the request and outcome(s) of the request.

Employee Responsibilities:

1. Submit a request for the development of an IAP to Human Resources.
2. Productively participate in the creation of the IAP.
3. Ensure all supporting documentation is submitted according to the set timelines; if more time is required, notify HR and request an extension.
4. Submit receipts for supporting documentation in order to receive reimbursement.
5. Participate in the assessment of the responsibilities and/or workspace in order to define barriers, and assist in the accommodation process.
6. If requesting the inclusion of a fellow employee in the process, provide the name and authorization of the person to HR, including the reason for inclusion.
7. Review and sign-off on the final documented copy of the IAP.
8. Participate in the review of the plan annually, and provide any relevant and necessary documentation.
9. Inform HR of any changes in your condition in order to properly review the plan and ensure it continues to meet accommodation needs.
10. Collaborate with HR to ensure the plan is presented in an accessible format that meets your needs.

5.0 REVISION RECORD

Rev	*Pages*	*Description*	*Revised By*	*Date*
Rel	*All*	*New Instruction*	*Maggie Kratz*	*May.2016*
001	*All*	*Reviewed; updates to font and formatting throughout*	*Maggie Kratz*	*Feb 2020*
002	*All*	*Compliance Review*	*Melanie Toth*	*November 6, 2023*