

## **The Accessibility for Ontarians with Disabilities Act (AODA) Customer Service Standard Policy & Procedures**

At Robertson Hall Insurance & Robertson Financial Group, we are committed to meeting the requirements of the accessibility standards, established by Accessibility for Ontarians with Disabilities Act (AODA), 2005, Customer Service Standard regulations, by January 1, 2012. Accessibility Standards for Customer Service applies to every organization and to every person or organization that provides goods or services to members of the public or other third parties and that has at least one employee in Ontario. The Workplace Accessibility Barriers Assessment is an organization wide assessment that aims at ensuring that we meet the legislative requirements as set out in Bill 118, the Accessibility for Ontarians with Disabilities Act, Customer Service Standard for January 1, 2012 and continue to do so through periodic assessments.

### **OUR MISSION**

To make reasonable efforts to ensure that policies, procedures, and practices, pertaining to the provision of goods and services to the public and other third parties, align with the independence, dignity, integration and equal opportunity guiding principles, as set out in Bill 118.

Robertson Hall Insurance & Robertson Financial Group values excellence in customer service for everyone who may benefit from services. This policy supports the principles as it provides respectful services that focus on the unique needs of each individual. This policy enables Robertson Hall Insurance & Robertson Financial Group to ensure that persons with disabilities have access to accessible and exceptional customer service.

### **OUR COMMITMENT**

In fulfilling our mission, Robertson Hall Insurance & Robertson Financial Group aims at all times to provide its goods and services in a way that respects the dignity and independence of people with disabilities. We are committed to giving people with disabilities the same opportunity to access our goods and services.

Through these policies and procedures, Robertson Hall Insurance & Robertson Financial Group aims to be respectful to the dignity and independence of persons with disabilities and we are committed to providing accessible integrated programs and services that are designed to meet individual needs.

A **disability** includes, but is not limited to, the following:

- Any degree of physical disability, infirmity, malformation or disfigurement that is caused by bodily injury, birth defect or illness and, without limiting the generality of the foregoing, includes diabetes mellitus, epilepsy, a brain injury, any degree of paralysis, amputation, lack of physical co-ordination, blindness or visual impediment deafness or hearing impediment, muteness or speech impediment, or physical reliance on a guide dog or other animal or on a wheelchair or other remedial appliance or device;
- A condition of mental impairment or a developmental disability;
- A learning disability, or a dysfunction in one or more of the processes involved in understanding or using symbols or spoken language;
- A mental disorder, or
- An injury or disability for which benefits were claimed or received under the insurance plan established under the Workplace Safety and Insurance Act, 1997.

**Accessible** shall mean capable of being entered or reached, approachable; easy to get at; capable of being influenced, obtainable; able to be understood or appreciated.

**Barrier:** Anything that keeps someone with a disability from fully participating in all aspects of society because of their disability. Barriers can be visible and invisible. They can be: architectural, physical, communication, attitudinal, technological and organizational.

**Assistive Device** shall mean a device used to assist persons with disabilities in carrying out activities or in accessing the services of persons or organizations covered by the Customer Service Standard. Assistive devices help people with a variety of disabilities. Here are some examples:

*For people who have vision loss:* magnifier - makes print and images larger and easier to read, white cane - helps people find their way around obstacles

*For people who are deaf, deafened, oral deaf, hard of hearing:* hearing aid - makes sound louder and clearer, teletypewriter (TTY) - helps people who are unable to speak or hear to communicate by phone

*For people who have physical disabilities:* mobility device (e.g., a wheelchair, scooter, walker, cane, crutches) - helps people who have difficulty walking

*For people who have learning disabilities:* electronic notebook or laptop computer - used to take notes and to communicate

*For people who have intellectual/developmental disabilities:* communication boards that are used to pass on a message by pointing to symbols, words or pictures

**Guide Dog** shall mean a dog trained as a guide for a person who is blind and having the qualifications prescribed by the appropriate regulations.

**Goods and Services** shall mean goods and services provided by Robertson Hall Insurance & Robertson Financial Group.

**Service Animals** shall mean animals that are used as a service animal for a person with a disability.

**Support Person** shall mean an individual hired or chosen by a person with a disability to provide services or assistance with communication, mobility, personal care, medical needs or with access to goods or services.

Robertson Hall Insurance & Robertson Financial Group is committed to excellence in serving all customers including people with disabilities and we will carry out our functions and responsibilities in the following areas:

**Communication**

- We will communicate with people with disabilities in ways that take into account their disability.
- We will train staff who communicate with customers on how to interact and communicate with people with various types of disabilities.

**Telephone Services**

- We are committed to providing fully accessible telephone service to our customers. We will train staff to communicate with customers over the telephone in clear and plain language and to speak clearly and slowly.

**Assistive Devices**

- We are committed to serving people with disabilities who use assistive devices to obtain, use or benefit from our services. We will ensure that our staff are trained and familiar with various assistive devices that may be used by customers with disabilities while accessing our services.

**Billing**

- We are committed to providing accessible invoices to all of our customers. For this reason, invoices will be provided in the following formats upon request: large print or e-mail.
- We will answer any questions customers may have about the content of the invoice in person, by telephone or email as required.

### **Use of service animals and support persons**

- We are committed to welcoming people with disabilities who are accompanied by a service animal on the parts of our premises that are open to the public and other third parties. We will also ensure that our staff are properly trained in how to interact with people with disabilities who are accompanied by a service animal.
- We are committed to welcoming people with disabilities who are accompanied by a support person. Any person with a disability who is accompanied by a support person will be allowed to enter Robertson Hall Insurance & Robertson Financial Group premises with his or her support person. At no time will a person with a disability who is accompanied by a support person be prevented from having access to his or her support person while on our premises.

### **Notice of temporary disruption**

- Robertson Hall Insurance & Robertson Financial Group will provide customers with notice in the event of a planned or unexpected disruption in the facilities or services usually used by people with disabilities. This notice will include information about the reason for the disruption, its anticipated duration, and a description of alternative facilities or services, if available.
- The notice will be placed at all public entrances and service counters or reception on our premises.

### **Training for staff**

- All full time and part time Robertson Hall Insurance & Robertson Financial Group staff will receive training policies, practices and procedures that affect the way goods and services are provided to people with disabilities. Staff will also be trained on an ongoing basis when changes are made to these policies, practices and procedures.
- Training will include the following:
  1. Review of the history and purposes of the Accessibility for Ontarians with Disabilities Act and the requirements of the customer service standard
  2. Review of Robertson Hall Insurance & Robertson Financial Group Service Policy & Procedures relating to the customer service standard.
  3. Tips on how to interact and communicate with people with various types of disabilities
  4. Tips on how to interact with people with disabilities who use an assistive device or require the assistance of a service animal or a support person
  5. Participate in the IBAO webinar.
  6. What to do if a person with a disability is having difficulty in accessing Robertson Hall Insurance & Robertson Financial Group services

**Feedback process**

- The ultimate goal of Robertson Hall Insurance & Robertson Financial Group is to meet and exceed customer expectations in serving customers with disabilities. Comments on our services regarding how well those expectations are being met are welcome and appreciated.
- Feedback regarding the way Robertson Hall Insurance & Robertson Financial Group provides goods and services to people with disabilities can be made by using the Customer Feedback Form. These can be submitted in person, by mail, fax or e-mail. These feedback forms should be directed to the Office Manager. Customers can expect to hear back within 24 hours with regards to their feedback.

**Modifications to this or other policies**

- We are committed to developing customer service policies that respect and promote the dignity and independence of people with disabilities. Therefore, no changes will be made to this policy before considering the impact on people with disabilities. Any policy of Robertson Hall Insurance & Robertson Financial Group that does not respect and promote the dignity and independence of people with disabilities will be modified or removed.
- Robertson Hall Insurance & Robertson Financial Group is committed to reviewing this policy on an annual basis, or more frequently where necessary.

**Questions about this policy**

- This policy exists to achieve service excellence for customers with disabilities. If anyone has a question about the policy, or if the purpose of a policy is not understood, please see the Office Manager.

***Management of the Brokerage will also comply with the following requirements:***

1. We will complete an online report on our compliance by the reporting deadline in 2012. Additional information on reporting requirements and deadlines will follow.