Office Ergonomic Assessment

Site collection: Environmental, Health, and Safety
Department: Environmental, Health, and Safety
Creator: Nicole Harris
Groups Used: Office Ergonomic Assessment Approvers

Solution function: The purpose of this solution is for employees and contingent workers to be able to submit a request for an ergonomic assessment from an EHS team member.

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Solution purpose

- The purpose of this solution is to replace an existing InfoPath form that was difficult for users to navigate and built in an outdated software platform.
- The stakeholders requested a new solution that corresponds with current business processes and features an updated user interface consistent with company branding guidelines.
- I created the new solution using SharePoint 2019 and the Nintex form and workflow platform.

Business Process

- Upon submission
  - Employee or contingent worker submits request → EHS team member is notified → HR is notified (if preexisting condition is applicable) → Evaluation scheduled (offline)

- Evaluation
  - EHS team member completes evaluation → team member starts workflow to notify EHS and submitter that evaluation is complete

Office Ergo Assessment

- Purpose of form:
  - Request an EHS team member ergonomic evaluation of workstation
- Users:
  - Submit the form: Employees and contingent workers
  - Evaluation: EHS team member (based on location)
- Scope:
  - Office workstations only

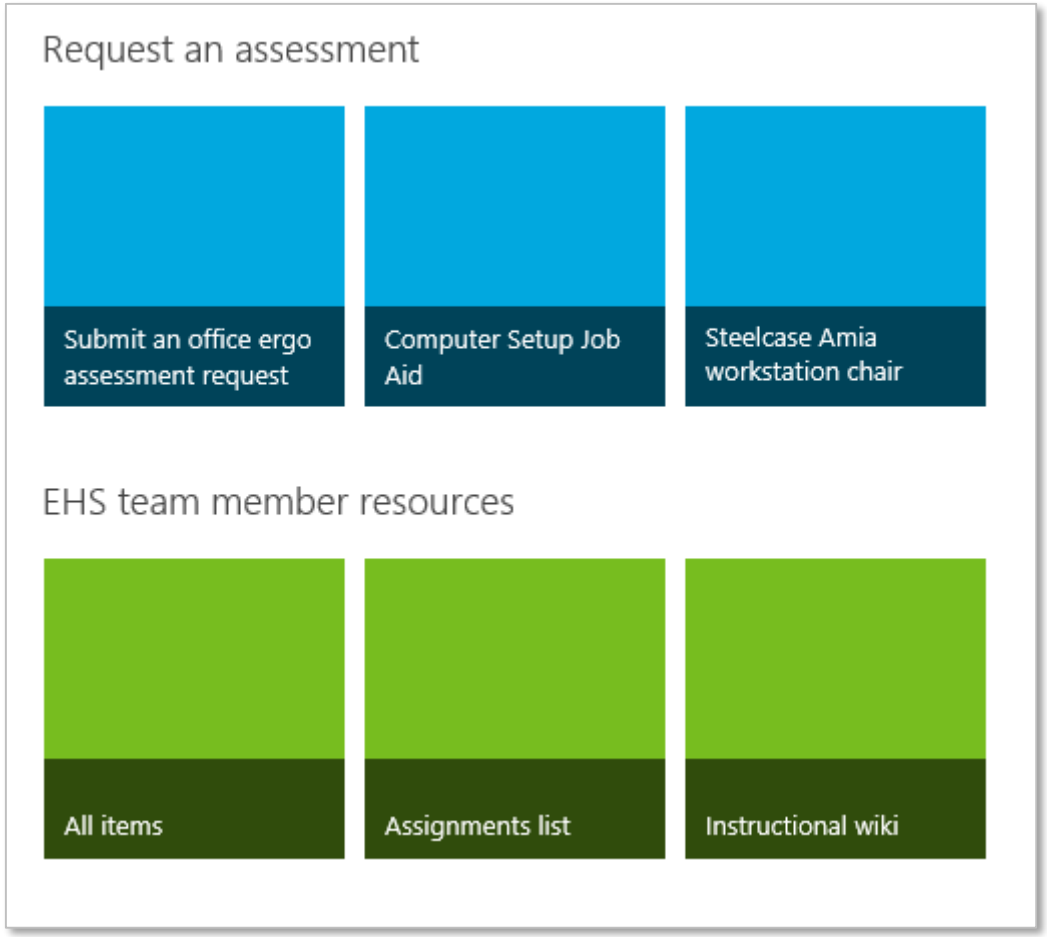
Office Ergo Assessment

- Requestor:
  - Environmental, Health, and Safety team
- Deliverables:
  - SharePoint list, Nintex form and workflow
  - SharePoint assignments list (custom list)
  - SharePoint landing page
- Where:
  - SharePoint 2019 production farm

SharePoint list access

List access

- Requests are submitted via a SharePoint landing page with promoted links.
  - Employees and contingent workers can submit a request via the “submit an office ergo assessment request” link.
  - The link takes users directly to the form in “new” view.
  - Resources are specifically for EHS team members and are permissions restricted.



Nintex form settings

Items on this list require content approval. Your submission will not appear in public views until approved by someone with proper rights. More information on content approval.

Office Ergonomic Assessment

Requestor information

Name: * TEH IS Harris, Nicole

Employee ID: 175110 **Department:** Information Systems

Job title: Business Systems Analyst **Phone:** +1-512-424-1858

Location: Austin **Date:** 5/30/2019

Workplace details

1. What is your main reason for requesting an ergonomic assessment? *

Note: equipment requests require department approval

- Please select a value...
- Other reason:

2. How many hours do you normally work per week (including average overtime)? *

3. How many hours a day do you spend at your workstation?

4. Do you take breaks during the workday? Yes No

5. If yes, how long and how often?

6. Do you stretch at work? Yes No

7. If yes, how often do you stretch?

8. Which is your dominant hand? Right Left

9. What types of activities do you participate in outside work?

10. Describe your discomfort (where it is, when does it happen).

11. On a scale of 1-10 (10 being the most painful), rate your discomfort at its worst. 1 2 3 4 5 6 7 8 9 10

12. What do you believe is the cause of your discomfort?

13. Do you have any suggestions for relieving or minimizing your discomfort?

14. Estimate the day you first noticed discomfort.

15. Does your discomfort increase towards the end of the work week? Yes No

16. Do you feel that your discomfort is work related? Yes No

17. Have there been any recent changes to your job or physical activity that may be contributing to your discomfort? Yes No

18. Have you visited a health care professional or physician for your discomfort? Yes No

19. Have you taken any time off for your discomfort or injury? Yes No

20. Do you have any work restrictions or limitations? Yes No

21. Do you have a previous injury or medical condition that could be contributing to your discomfort? Yes No

Submit Cancel

EHS to complete the remaining portion

Assessor name: Date:

Employee discomfort

☐ Headache	☐ Right shoulder	☐ Left shoulder
☐ Eyestrain / Vision	☐ Right elbow	☐ Left elbow
☐ Neck	☐ Right wrist / hand	☐ Left wrist / hand
☐ Upper back	☐ Right hip / thigh	☐ Left hip / thigh
☐ Lower back	☐ Right knee	☐ Left knee
☐ Other discomfort	☐ Right ankle / feet	☐ Left ankle / feet

Discomfort notes:

Workstation evaluation

Space is organized to match task needs	○ Yes ○ No ○ n/a	Monitor screen is clean and glare-free	○ Yes ○ No ○ n/a
Items used often are within easy reach	○ Yes ○ No ○ n/a	Monitor to eye distance is between 16" - 28"	○ Yes ○ No ○ n/a
Chair is adjusted properly and employee knows how to use the adjustable features	○ Yes ○ No ○ n/a	Top of monitor is at or slightly lower (1" - 2") than eye level	○ Yes ○ No ○ n/a

Posture

Overall posture is neutral	○ Yes ○ No ○ n/a	Feet are supported	○ Yes ○ No ○ n/a
Leg / thigh / foot clearance is adequate	○ Yes ○ No ○ n/a	Gap between seat pan and back of knees is 2" - 4"	○ Yes ○ No ○ n/a
Lower back is supported	○ Yes ○ No ○ n/a	Wrists are straight (within 10°) when keying / mousing	○ Yes ○ No ○ n/a
Shoulders are relaxed	○ Yes ○ No ○ n/a	Elbows are at 90° and remain close to the sides when keying / mousing	○ Yes ○ No ○ n/a
Mouse is adequate size and style	○ Yes ○ No ○ n/a	No contact pressure on wrist or forearms	○ Yes ○ No ○ n/a
Head is in neutral position	○ Yes ○ No ○ n/a	Employee facing square towards the monitor	○ Yes ○ No ○ n/a

Vision

Eye exam in the last 12 months?	○ Yes ○ No ○ n/a	Special eye correction used?	○ Yes ○ No ○ n/a
Ambient light is appropriate	○ Yes ○ No ○ n/a	If eye correction is used, bifocals / trifocals?	○ Yes ○ No ○ n/a

Evaluation notes:

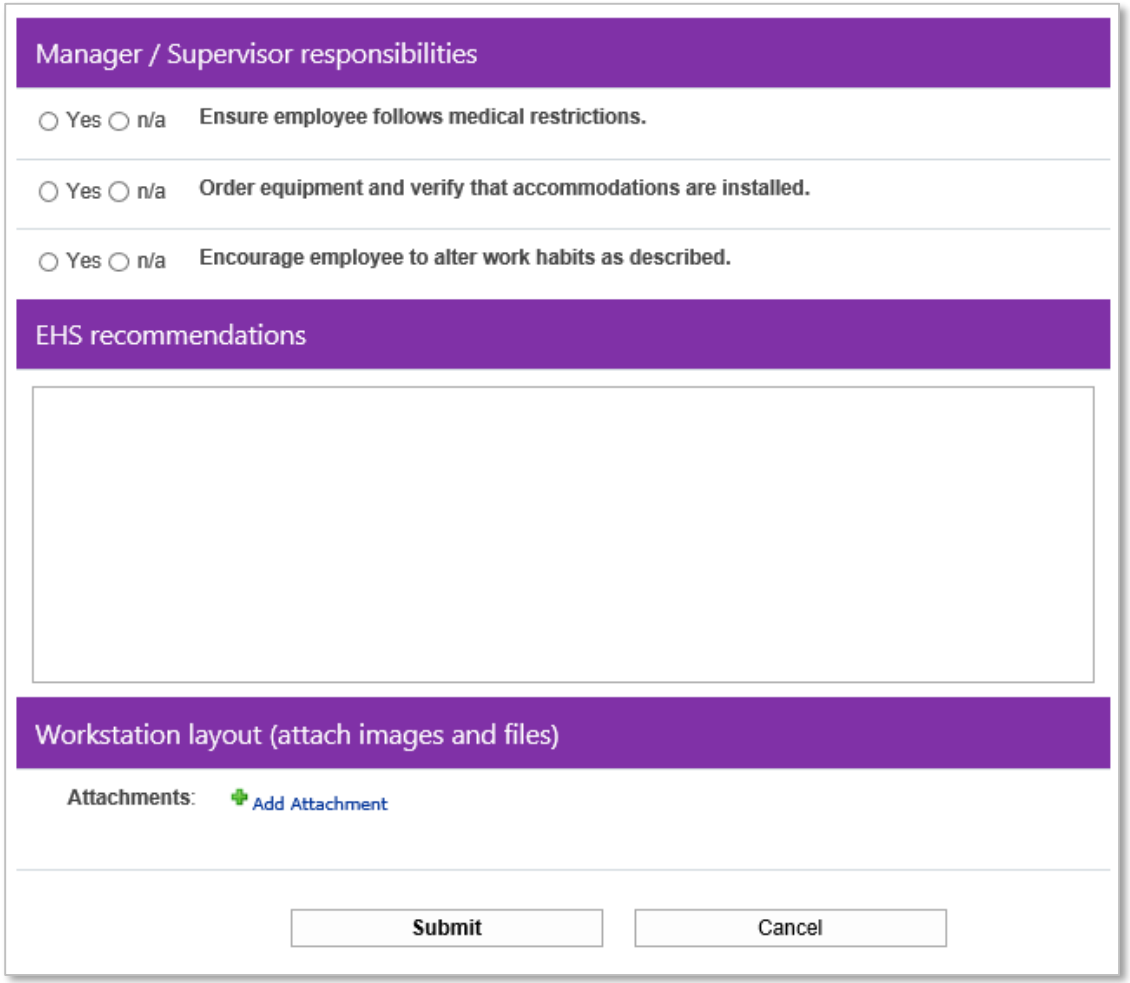
Equipment needed

☐ Anti-glare screen	☐ Monitor	☐ Headrest
☐ Footrest	☐ Mouse	☐ Lumbar support
☐ Keyboard	☐ Mouse pad	☐ Sit / stand station
☐ Keyboard tray	☐ Wrist rest	☐ Chair

Equipment notes:

EHS evaluation

- EHS evaluation
  - Employee discomfort
  - Workstation evaluation
  - Manager responsibilities
  - EHS recommendations
  - Workstation layout



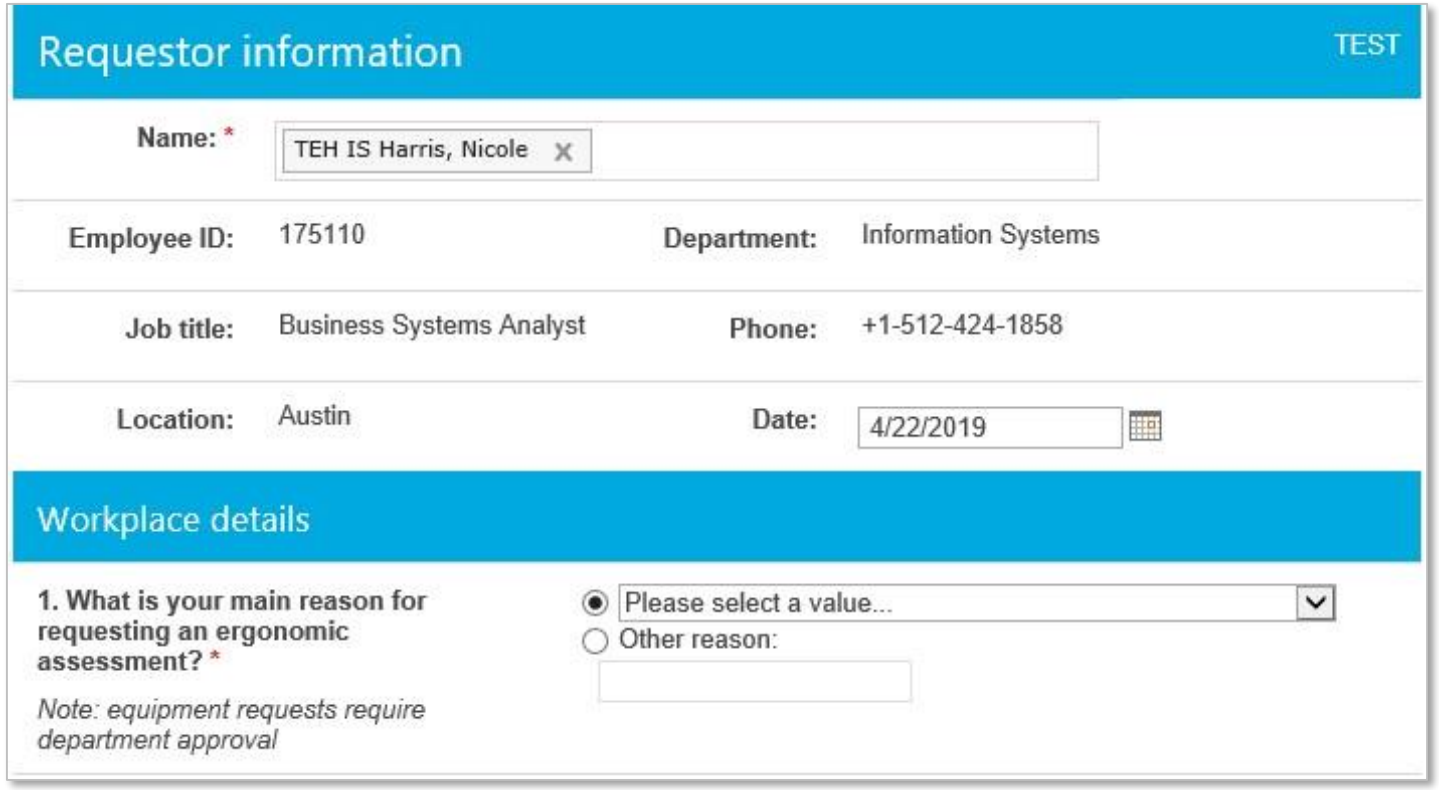
Form settings

- Requester information:
  - “New,” “Edit,” and “Display” modes
  - Submitter only sees the requester section on opening a new form

- EHS evaluation:
  - Hidden in “New” mode
  - Viewable in “Edit” and “Display” mode
  - For EHS team members only

Form settings

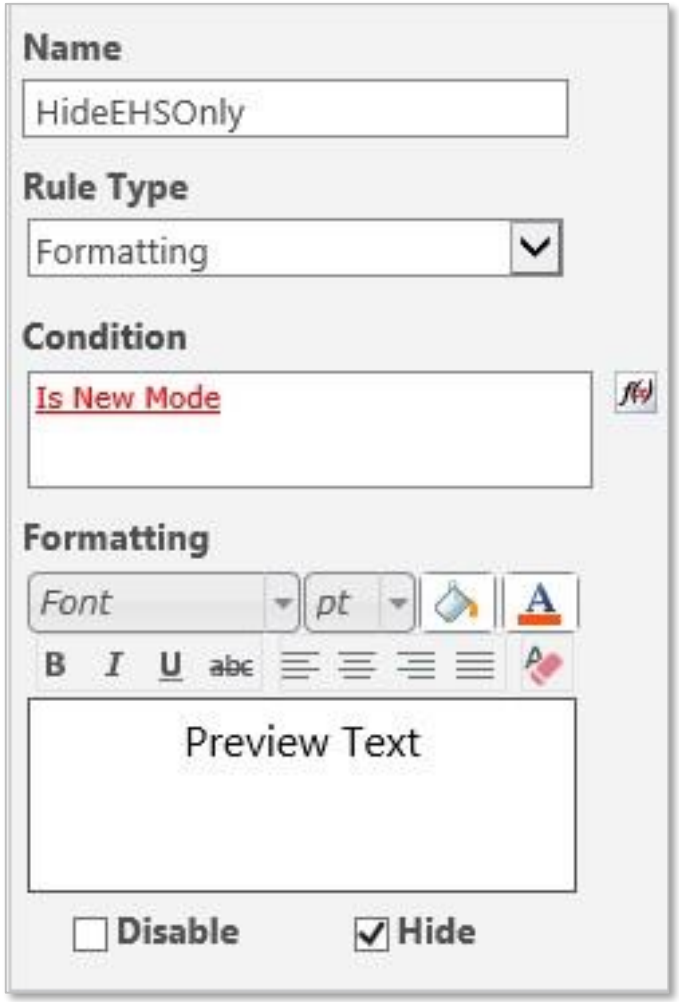
- User profile lookup for requestor details
  - Employee ID, job title, department, location, phone



Form settings

- Formatting
  - Hide EHS only section in “new” mode

- EHS only section
  - Employee discomfort
  - Workstation evaluation
  - Manager / Supervisor responsibilities
  - EHS recommendations
  - Workstation layout (attachments)



Form settings

- Validation
  - Required depending on choices selected

- EHS only section
  - Employee discomfort
  - Workstation evaluation
  - Manager / Supervisor responsibilities
  - EHS recommendations
  - Workstation layout (attachments)

Usability testing feedback

- Add additional notes fields in workstation evaluation section
- Consider who reports manager feedback
- Consider print to pdf view line breaks
- Remove redundant fields

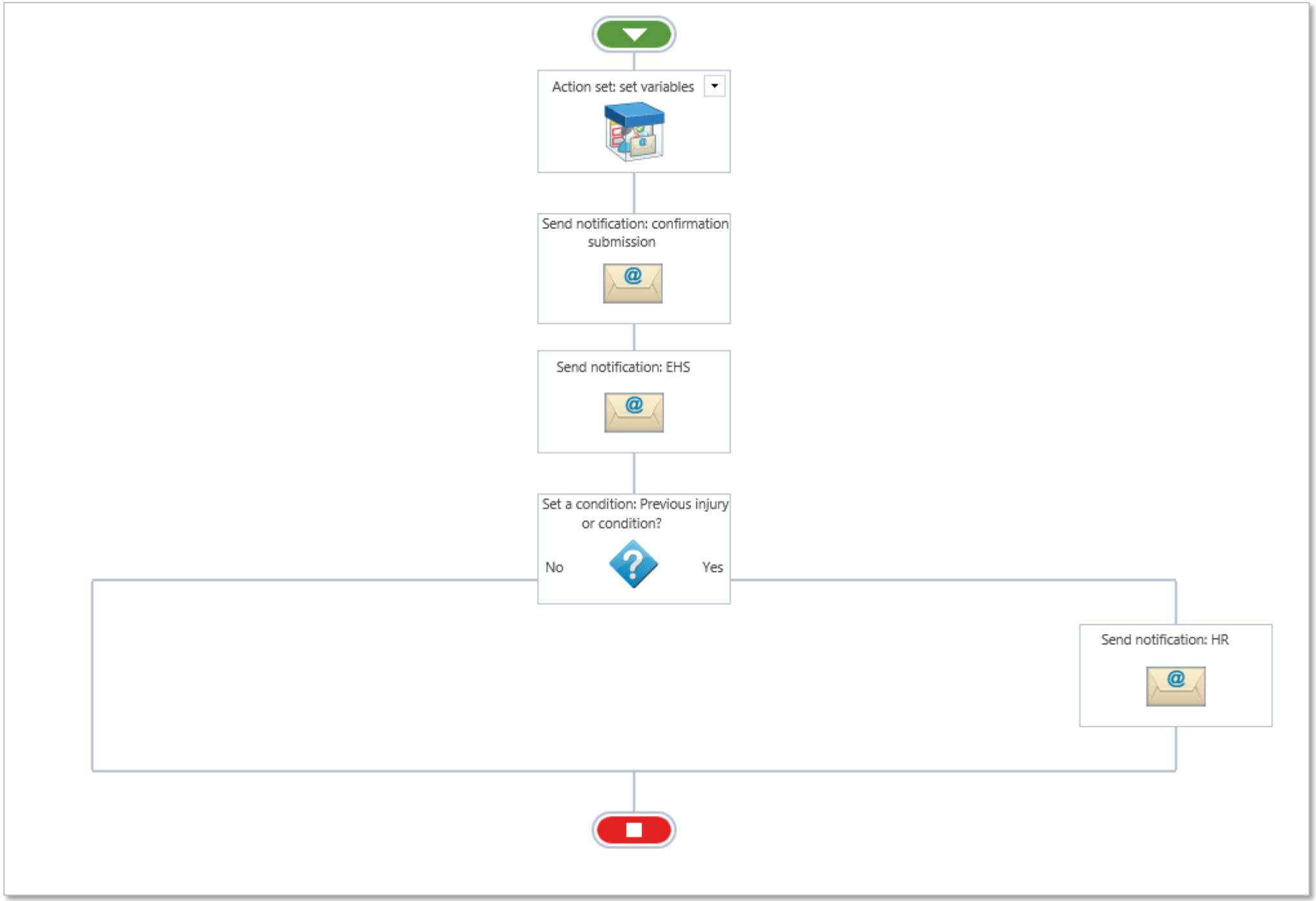
- Number question fields
- Left justification
- Bold field labels
- Clarify terms
- Field alignment

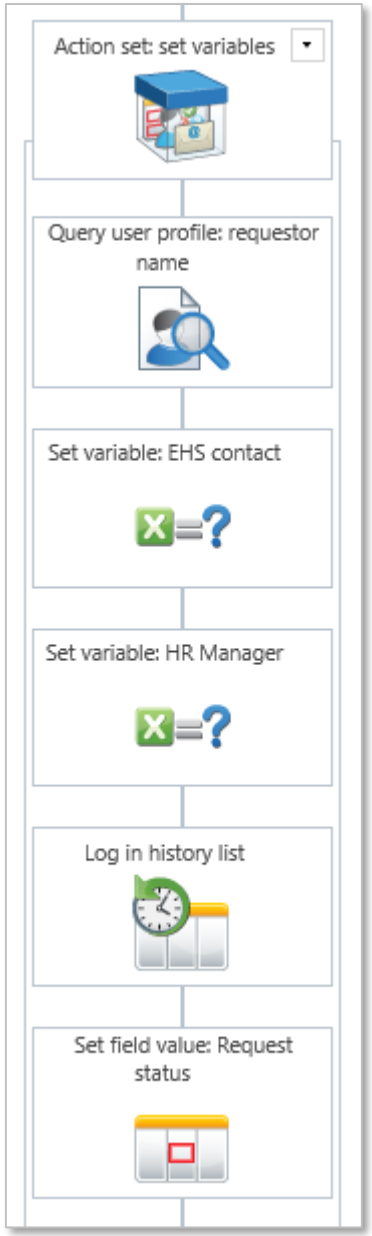
Nintex workflow settings

Workflow actions

- Office Ergonomic request workflow
  - Starts when a new item is created

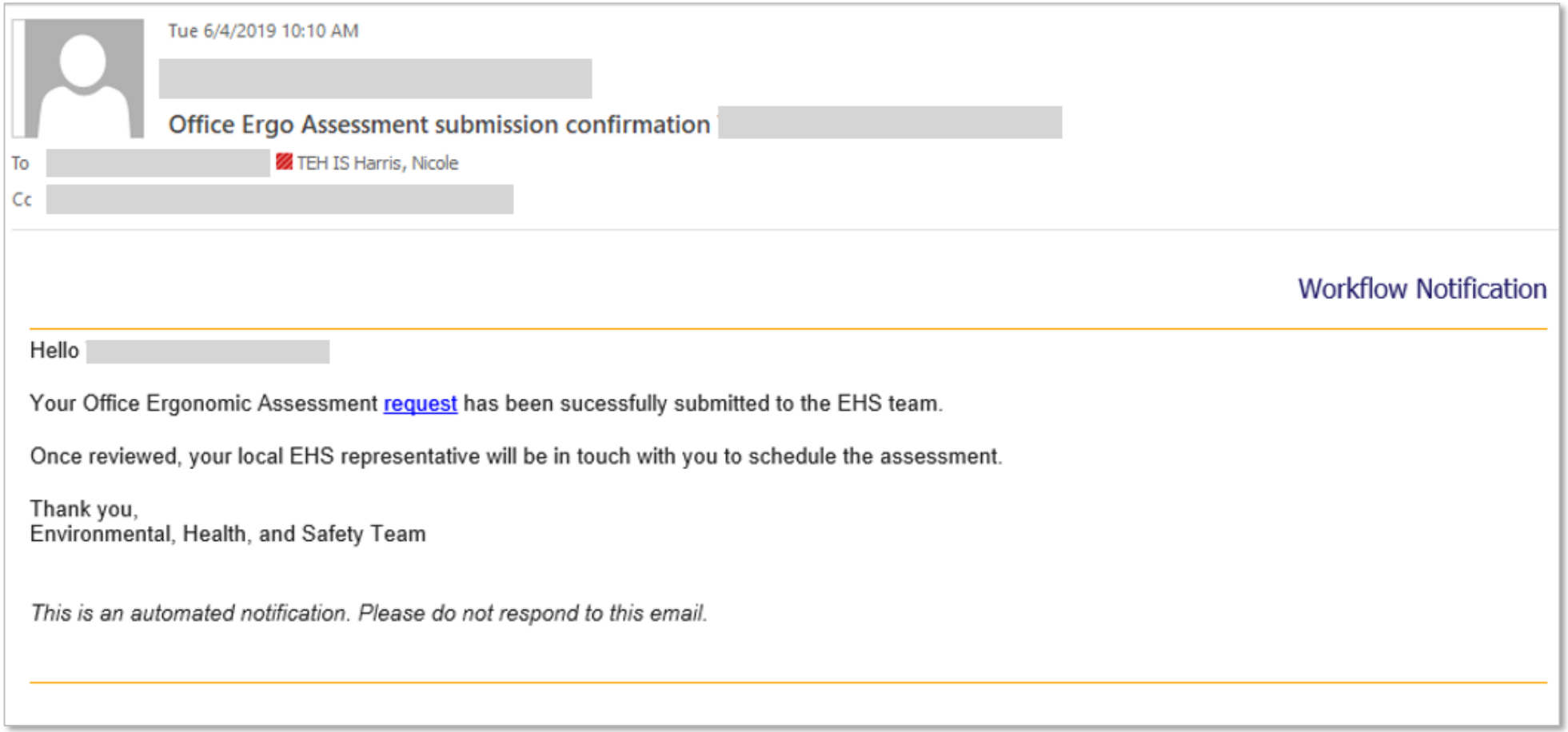
- **Action set: variables**
  - Several actions to set variables for requestor, HR manager, and EHS contact by location
- **Send notification: confirm submission**
  - Sends notification to requestor to confirm form submission
- **Send notification: EHS**
  - Sends notification to EHS team member based on location
- **Condition: pre-existing condition True?**
  - If preexisting condition is selected, and employee is True, sends notification to Human Resources department


Action set: set variables
Send notification: confirmation submission
Send notification: EHS
Set a condition: Previous injury or condition?
No
Yes
Send notification: HR


Action set: set variables
Query user profile: requestor name
Set variable: EHS contact
Set variable: HR Manager
Log in history list
Set field value: Request status

Workflow notifications

- Example notification for workflow action: **Send notification: confirmation submission**



Tue 6/4/2019 10:10 AM

Office Ergo Assessment submission confirmation

To TEH IS Harris, Nicole

Cc

Workflow Notification

Hello

Your Office Ergonomic Assessment request has been sucessfully submitted to the EHS team.

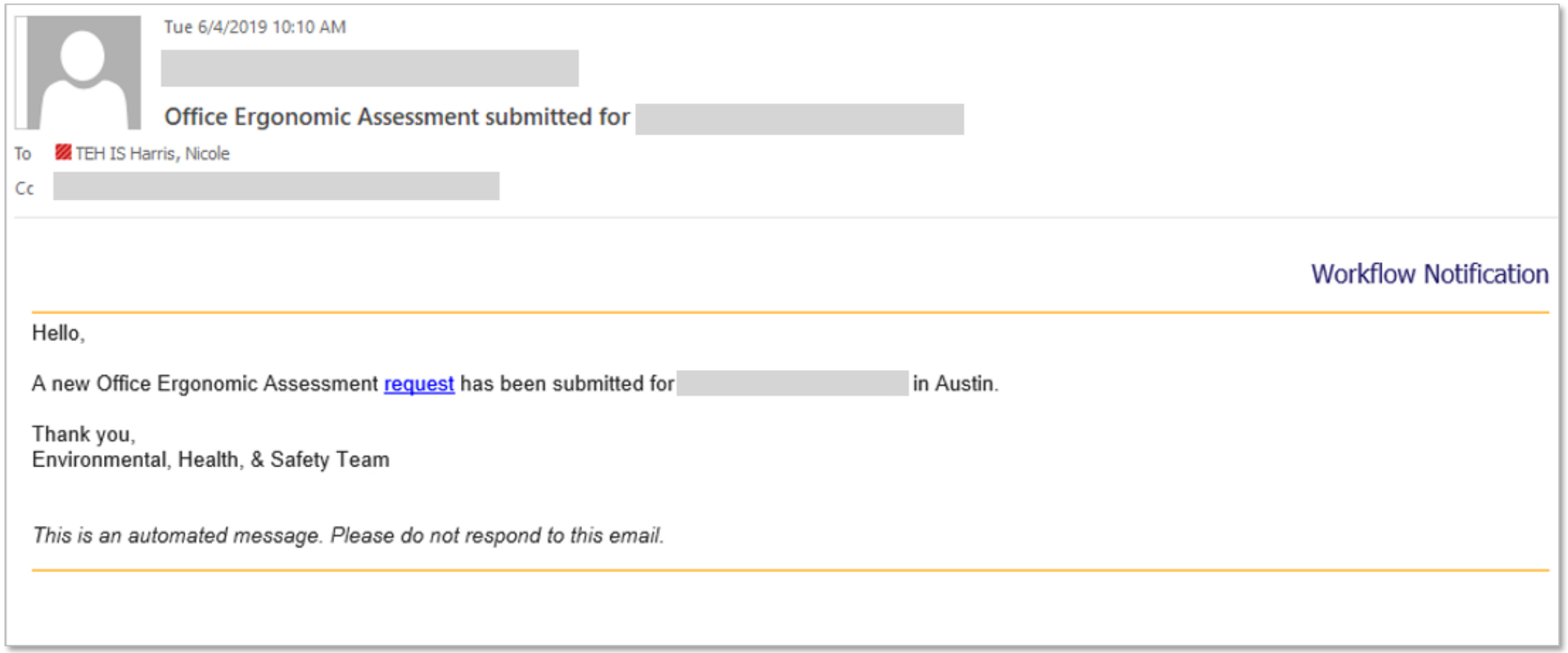
Once reviewed, your local EHS representative will be in touch with you to schedule the assessment.

Thank you,
Environmental, Health, and Safety Team

This is an automated notification. Please do not respond to this email.

Workflow notifications

- Example notification for workflow action: **Send notification: EHS**



Tue 6/4/2019 10:10 AM

Office Ergonomic Assessment submitted for

To TEH IS Harris, Nicole

Cc

Workflow Notification

Hello,

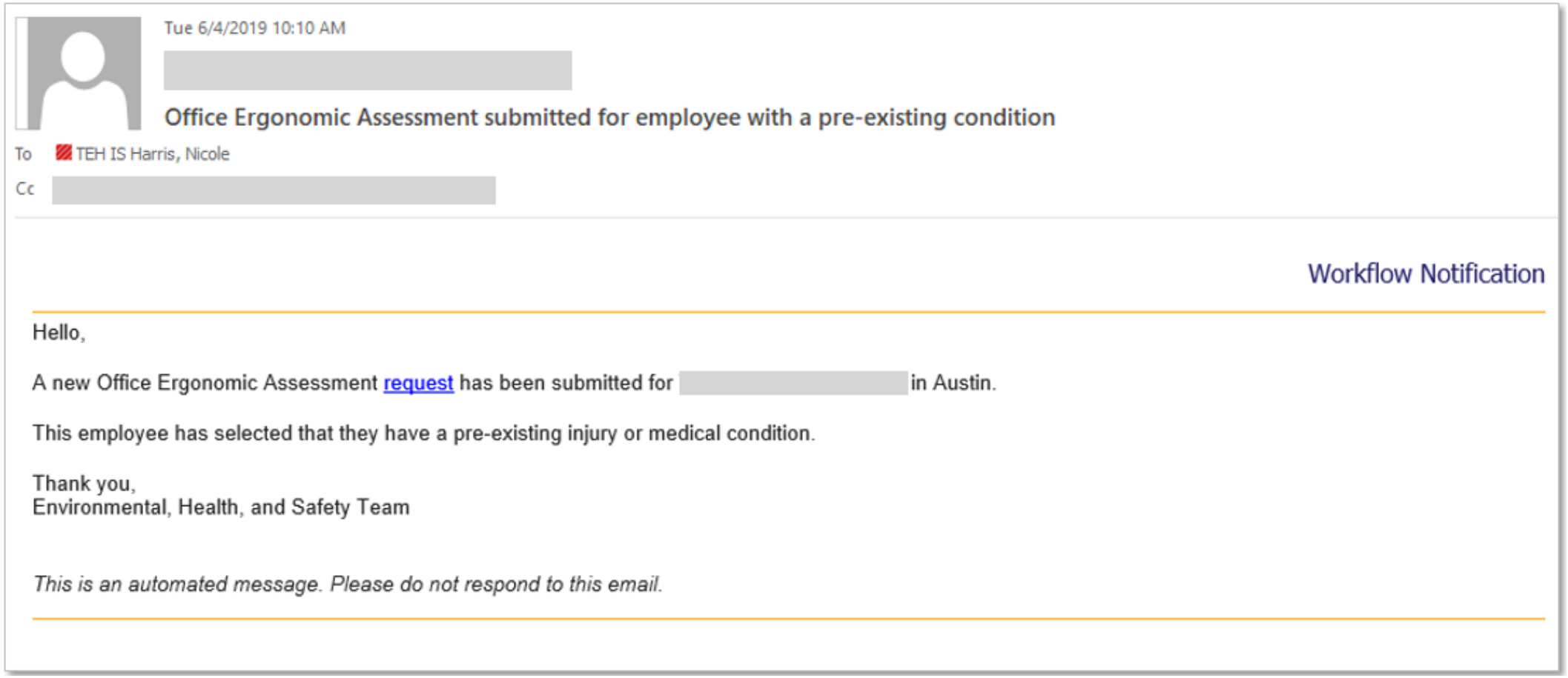
A new Office Ergonomic Assessment request has been submitted for in Austin.

Thank you,
Environmental, Health, & Safety Team

This is an automated message. Please do not respond to this email.

Workflow notifications

- Example notification for workflow action: **Send notification: HR**



Tue 6/4/2019 10:10 AM

[redacted]

Office Ergonomic Assessment submitted for employee with a pre-existing condition

To TEH IS Harris, Nicole

Cc [redacted]

Workflow Notification

Hello,

A new Office Ergonomic Assessment request has been submitted for [redacted] in Austin.

This employee has selected that they have a pre-existing injury or medical condition.

Thank you,
Environmental, Health, and Safety Team

This is an automated message. Please do not respond to this email.

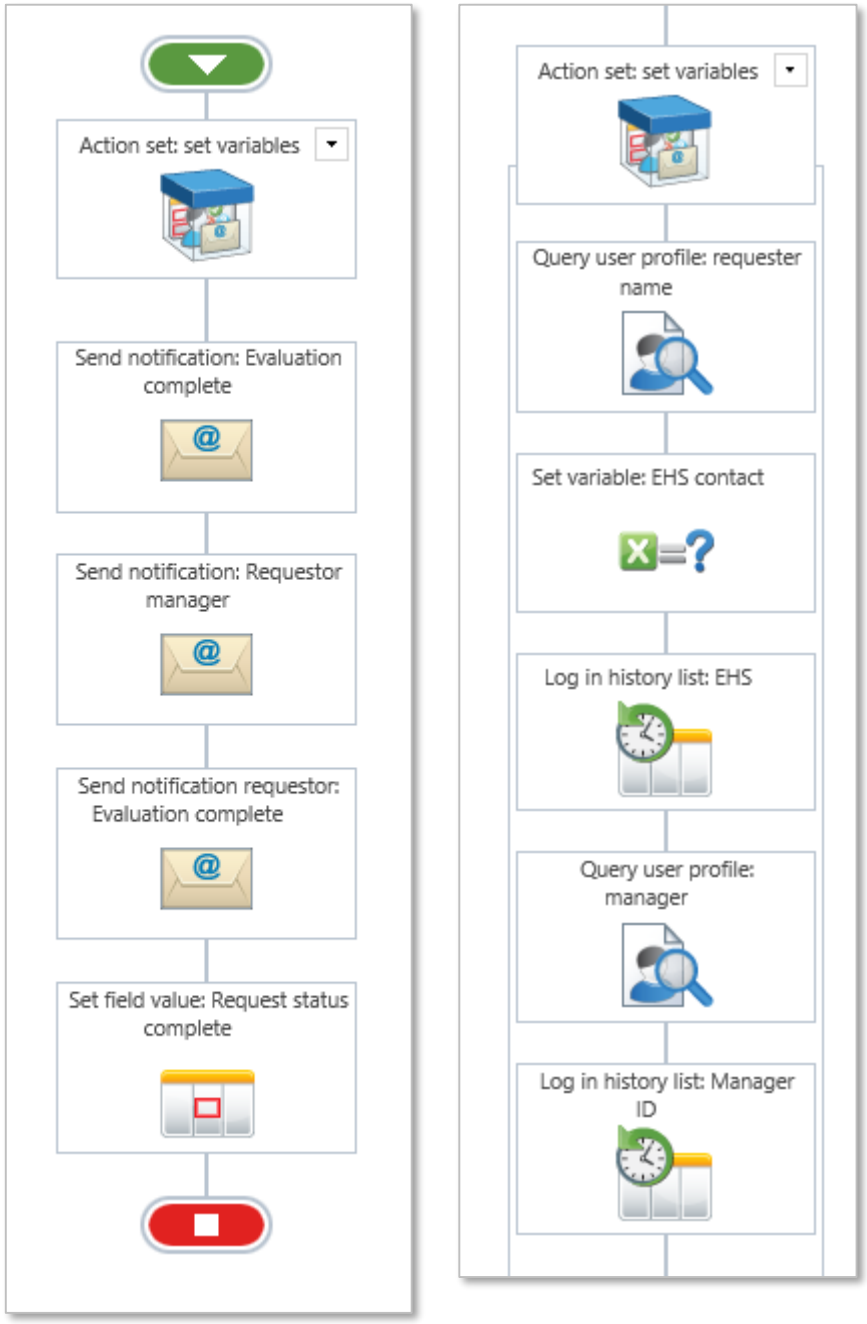
Workflow actions

- Evaluation complete (2nd workflow)
  - Starts manually following completion of EHS team member evaluation

- **Action set: variables**
  - Several actions to set variables for requestor name and EHS contact by location.
- **Send notification: evaluation complete**
  - Sends notification to EHS team confirming that evaluation is complete
- **Send notification: requestor manager**
  - Send notification with brief summary of employee or contingent worker assessment
- **Send notification requestor: evaluation complete**
  - Sends notification to requestor confirming that evaluation is complete
- **Update field: request status**
  - Request Status field value changed to complete

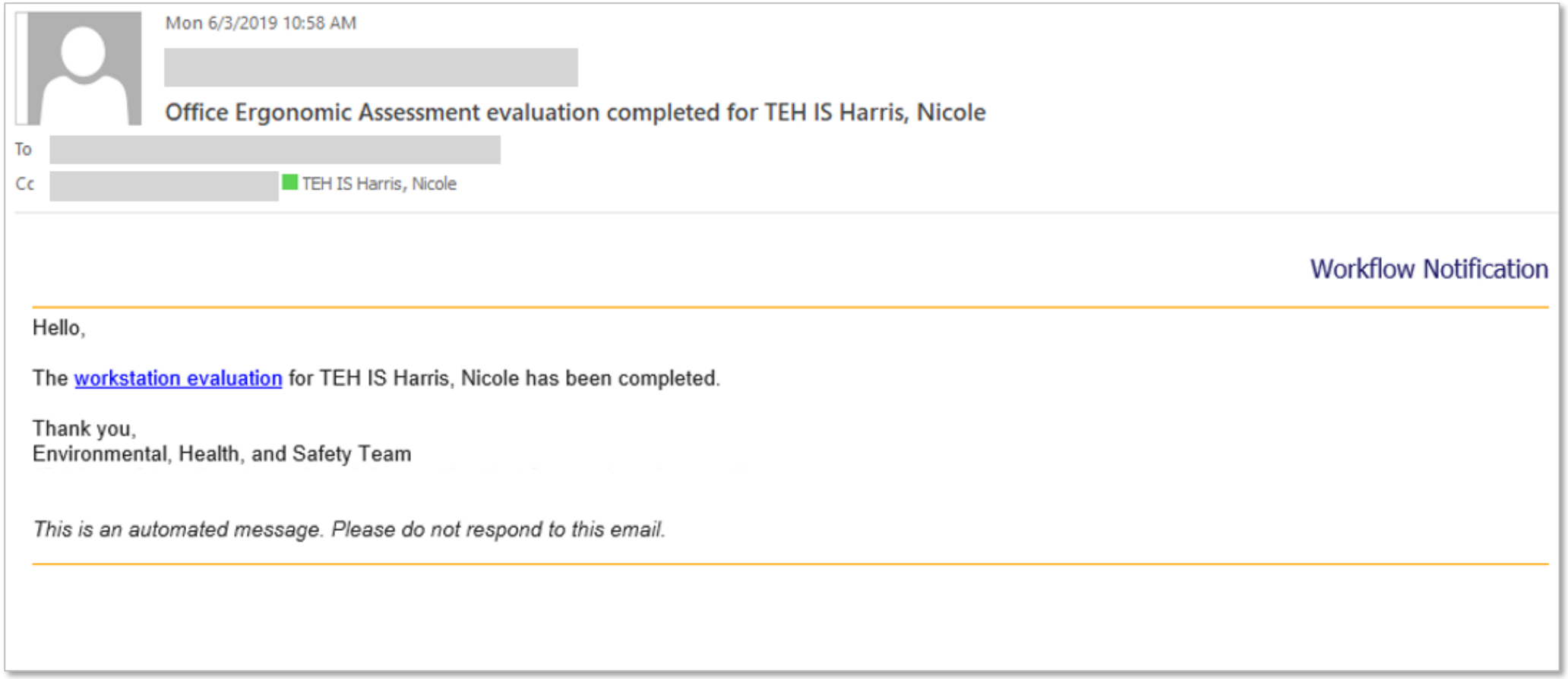
Evaluation complete workflow

- Evaluation complete (2nd workflow)
  - Starts manually following completion of EHS team member evaluation



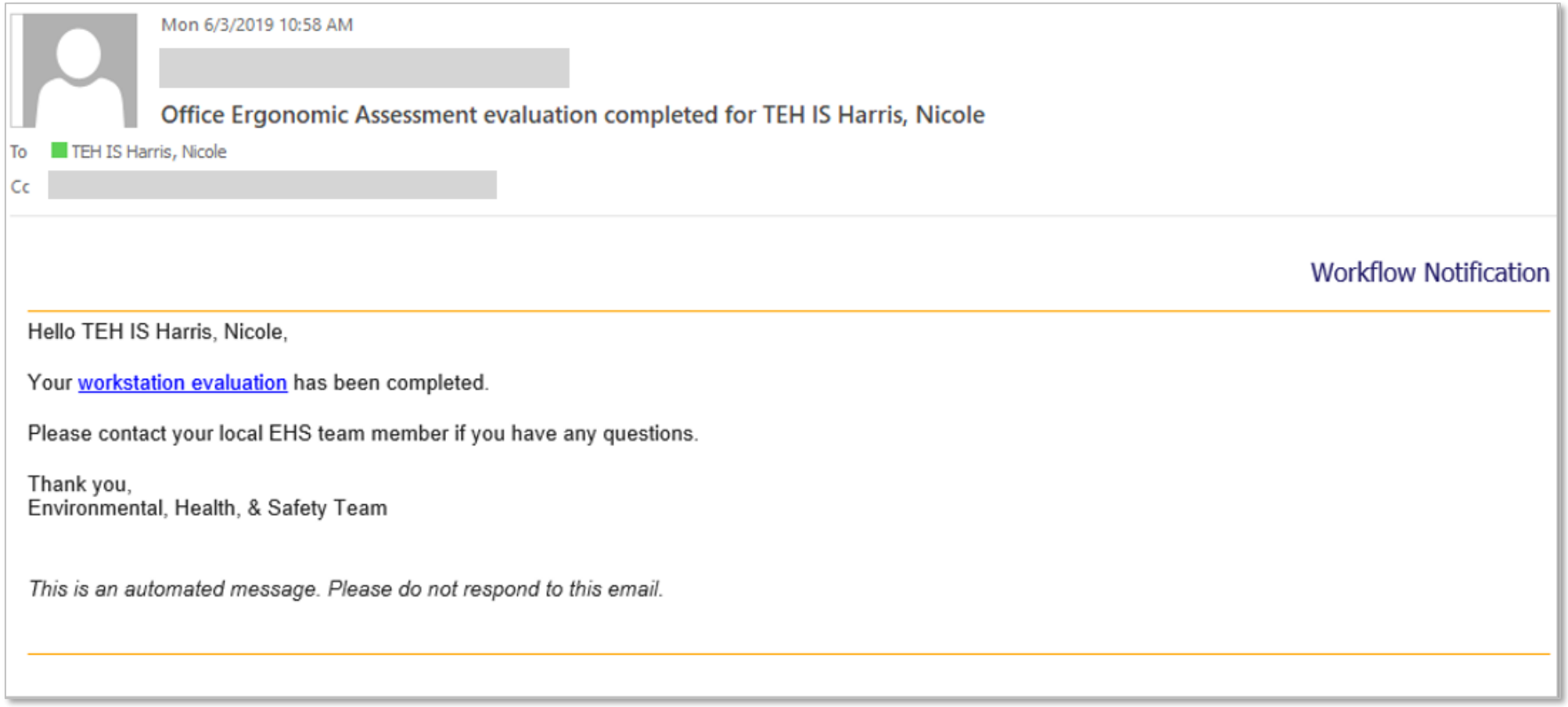
Workflow notifications

- Example notification for workflow action: **Send notification: evaluation complete**



Workflow notification

- Example notification for workflow action: **Send notification requestor: evaluation complete**



Mon 6/3/2019 10:58 AM

[redacted]

Office Ergonomic Assessment evaluation completed for TEH IS Harris, Nicole

To TEH IS Harris, Nicole

Cc [redacted]

Workflow Notification

Hello TEH IS Harris, Nicole,

Your workstation evaluation has been completed.

Please contact your local EHS team member if you have any questions.

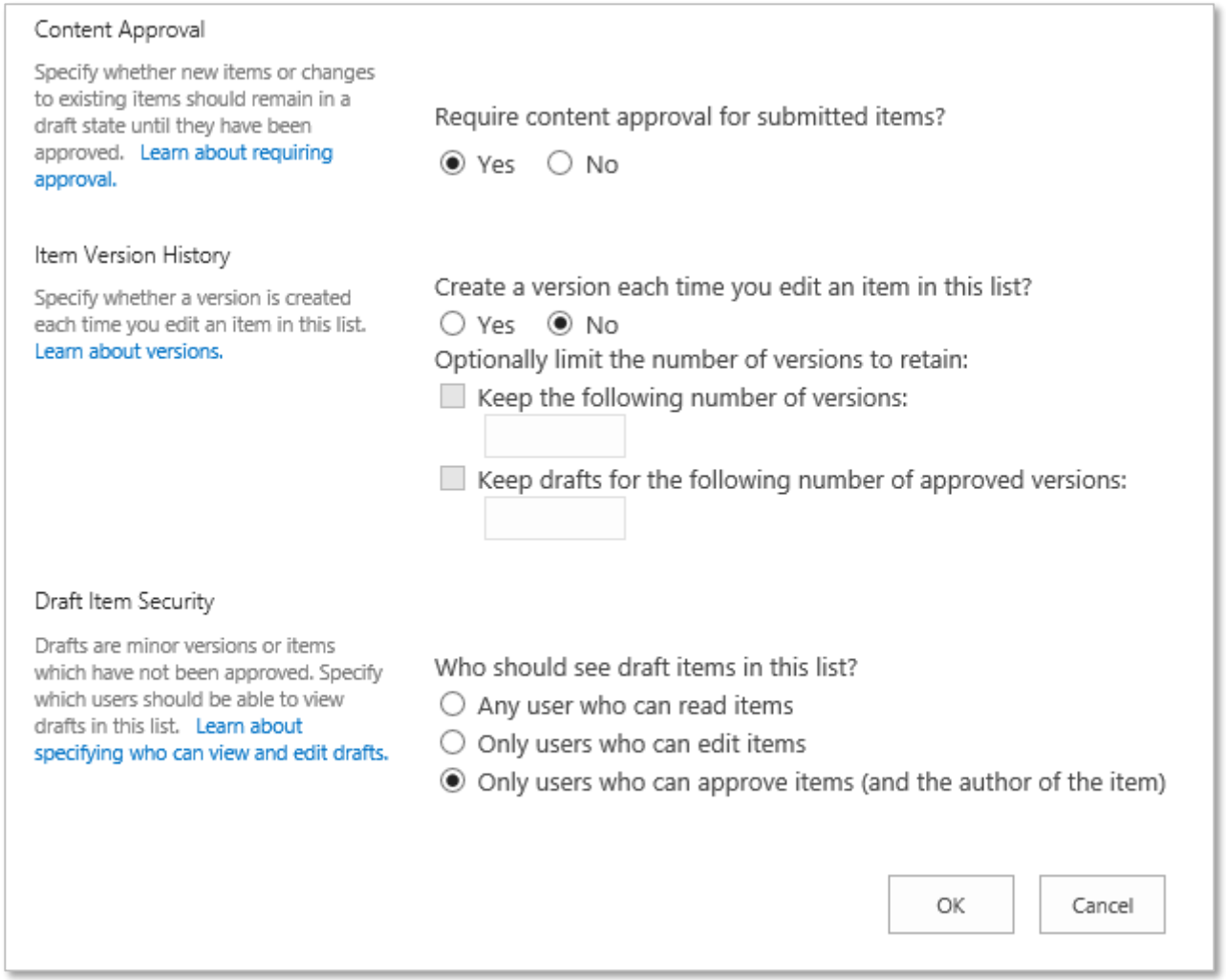
Thank you,
Environmental, Health, & Safety Team

This is an automated message. Please do not respond to this email.

Permissions

Content approval

- Only users who approve items and the author of the item can see draft items.
- Approvers can see all items, employees can only see their individual entry.
- All items will remain “pending”



Permissions groups

- Approvers: Only EHS team members and managers can see all items submitted.
- All SharePoint Users: All employees and contingent workers can add items.