

UCSC OFFICE ERGONOMICS MATCHING FUNDS PROGRAM

General Guidelines

Office Ergonomics Matching Funds Program

The ErgoCruz Matching Funds Program offers up to \$600.00 per employee per year in matching funds to departments to modify on-site office computer workstations according to campus ergonomic guidelines. The intent is to provide campus departments funding support to promote “comfort at the keyboard” as well as prevent and/or minimize the effects of office-related repetitive motion injuries.

- Matching funds are available for furniture or accessories recommended by a trained Departmental Ergonomic Assessor (DEA) or the Campus Ergonomist as a result of an ergonomic office computer workstation evaluation.
- The program will pay the first \$200 plus 60% of the remaining total costs of recommended purchases up to a total program contribution of \$600 per employee per year.
- The matching funds program does not apply to office workstation furniture for large new construction, renovation, and department relocation projects. The program does not cover any costs associated with the purchase of new computers or monitors. Computers and monitors are considered basic operational work tools that fall under the department’s responsibility to provide. If these are recommended as a result of an ergonomic evaluation, the department may be required to provide them at their own expense. This program is focused on supporting individual employees at their primary computer workstation(s). Shared workstations may fall outside this program’s focus and need to be funded locally by the department or in partnership with Risk Services regarding ergonomic upgrades. For more information about Risk Services safety improvement funding visit: <http://risk.ucsc.edu/be-smart-about-safety.html> .

How departments can qualify for matching funds

To qualify for matching funds, the following four steps must be completed:

- 1. Training.** Departments volunteer to sponsor one of their employees to become a trained Departmental Ergonomic Assessor, (DEA). Also, all employees receiving ergonomic evaluations and support through this program must first complete UCSC online computer workstation ergonomic training class and provide a self-assessment of their own workstation as part of the evaluation process.
- 2. Ergonomic Assessment.** A trained Departmental Ergonomic Assessor (DEA), or the Campus Ergonomist conducts an office workstation and workstyle assessment and makes specific recommendations for (a) the purchase of furniture and/or accessories and (b) modifications to employee’s workstyle and workstation setup consistent with accepted safe work practices.
- 3. Response.** The department purchases the recommended products. The DEA or Campus Ergonomist verifies product purchase and/or installation and employee compliance with recommended workstyle modifications.
- 4. Reimbursement.** The department submits the Matching Funds Application Form including supporting documentation to the Campus Ergonomist. See below for a detailed list of the application documentation requirements.

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1. **TRAINING:** Employee and DEA each complete required training
 - Employee Training: The approved training and self-assessment program for all employees is available online at the UCSC ErgoCruz webpage at: <http://ehs.ucsc.edu/programs/ergo/ergocruz.html> along with more information on this training system. Each employee must have completed this training within the past 2 years prior to their ergonomic evaluation containing product recommendations to be submitted for matching funds.
 - DEA Training: The department-designated DEA must attend **Departmental Ergonomic Assessor Training**, a free workshop that prepares designated employees to conduct a basic office workstation and workstyle assessment, recommend improvements, and train employees in the correct use of ergonomic office furniture and equipment. Contact the Campus Ergonomist/Program Administrator at: <http://ehs.ucsc.edu/programs/ergo/ergocruz.html> for specific information on upcoming training classes. DEAs must also attend periodic skill refresher sessions or continuing education courses in ergonomics which will be offered free on a periodic basis by the Campus Ergonomist.

2. **ERGONOMIC ASSESSMENT:** A trained DEA conducts an office workstation assessment and makes specific recommendations for the purchase of furniture and accessories from a UCSC pre-approved ergonomic products list or other sources as well as workstation setup and work style modifications necessary to prevent injury.
 - Workstation evaluations are to be conducted by/with the department's DEA using the campus Ergonomic Computer Workstation Evaluation form.
 - Employees requiring evaluation because of reported recent-onset (i.e., ≤ 14 days duration) discomfort shall report this to the Campus Ergonomist to determine if the evaluation should be escalated to a level to be performed by the Campus Ergonomist or other professional provider of such services. The DEA will review any findings of the professional evaluation for employee follow-up and for continuing education purposes.
 - The DEA will complete the computer workstation assessment form with the specific recommendations included. The computer workstation assessment form must be submitted with the ErgoCruz Matching Funds Application Form, and a copy of the assessment form should also be kept with department Injury and Illness Prevention Program files.
 - It is recommended that large departments train a number of evaluators to ensure availability and continuity of service within the department. For those departments that do not yet have evaluators, the ErgoCruz program offers DEA training periodically. Contact the Campus Ergonomist for information regarding upcoming trainings.

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- Departments which choose not to designate and train a DEA may request an outside contractor to provide the evaluation(s) for them. EH&S will provide contact information and the evaluator will charge the requesting department for the service at a rate of \$150 per hour (plus travel time) to complete the recommendations and funding application. Contracted evaluator charges do not qualify for Ergonomics Matching Funds and will not be reimbursed.
3. **RESPONSE:** The department purchases and installs the recommended products.
- If the workstation evaluation identifies the need for specific modifications, ErgoCruz has developed a pre-approved product list for the matching funds program. These products provide comfort and/or adjustability, are available for a wide range of employees, and conform to University procurement contracts. Please see the ErgoCruz Matching Funds Pre-approved Product List for details. Reimbursements are not limited to only products on this list. The list however consists of products identified as being highly effective in removing or reducing ergonomics risk factors in the computer workstation environment.
 - Many of the pre-approved products are on display in the campus Ergonomics Showroom, and we highly recommend that employees see and try the products before purchase to ensure they are appropriate for the employee's situation. Visits to the Showroom are by appointment only and are made directly with the Campus Ergonomist.
 - If recommended products are to be purchased, a purchase order for the recommended furniture or equipment should be submitted to the supplier within 90 days of the evaluation.
 - If a product is requested which is not on the pre-approved list, it will not be covered under the ErgoCruz Matching Funds program unless purchase has been approved by the Campus Ergonomist. The DEA must request approval prior to recommending products not on the list.

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4. **REIMBURSEMENT:** The department submits the Matching Funds Application form including supporting documentation to the ErgoCruz Program Administrator at **MailStop: ErgoCruz**:
 - An application must be submitted for each employee whose workstation requires modification and must contain the following:
 1. Completed Computer Ergonomics Matching Funds Application form signed by the supervisor or signature of authority, and
 2. Completed Computer Workstation Ergonomic Assessment form for employee's workstation.
 3. Copy of online ergonomic employee training confirmation.
 4. Copies of product invoices, receipts, or order expenditure confirmation forms listed on the Matching Funds Application form.
 5. A “financial detail report” documenting the expensed costs in Banner and showing the complete FOAPALs used to purchase the products or furnishings.
 - Upon approval of your application, ErgoCruz will transfer up to the first \$200 plus 60% of the remaining balance of the purchase costs, including all tax, shipping, and installation charges as shown on the receipt(s), to a total of \$600 per employee per year to the FOAPALs indicated on the application documents.
 - Funding for this program is limited. Applications will be considered on a first-come, first-served basis throughout the fiscal year..
 - Funding reimbursement will be delayed or denied for applications that are incomplete or provide incorrect supporting documentation.