



AODA, Customer Service Standard (CSS) Policy, Commitment Statement & Multi Year Plan

Introduction

In accordance with the Ontarians with Disability Act (ODA, 2001) and the Accessibility for Ontarians with Disability Act (AODA, 2005), CaseWare International Inc., and its related companies (hereinafter collectively referred to as “CaseWare”) has developed a policy to ensure that persons with disabilities have equal access to our services in a way that respects their dignity and independence.

The following policies, procedures and practices are guided by the fundamental principles underlying the Customer Service Standard (CSS) (Regulation 429/07), and we are committed to ensuring that the Policy is carefully observed by all employees and any third party that provides goods and services on our behalf.

Mission Statement

CaseWare International Inc. is committed to providing accessible service to persons with disabilities, and will make reasonable efforts to ensure that this Policy and related policies and procedures are consistent with the following principles as prescribed in the Customer Services Standard (CSS):

- (a) We will provide goods or services in a manner that respects the dignity and independence of persons with disabilities.
- (b) We will provide integrated services to persons with disabilities wherever possible and will provide alternate measures where necessary, whether temporarily or on a permanent basis, to enable a person with a disability to obtain, use or benefit from the goods or services.
- (c) We will provide equal opportunity to persons with disabilities to obtain, use and benefit from the goods or services.

Providing Goods and Services to People with Disabilities

1. Communication

When communicating with persons with disability, CaseWare will take into account the particular individual's needs and circumstances. CaseWare employees, agents and thirds parties who communicate with customers will be trained on how to interact and communicate with people with various types of disabilities in order to ensure that CaseWare provides responsive and effective communication. All communication shall be provided in a manner that respects the dignity and independence of persons with disabilities.



2. Assistive Devices

Persons with disabilities shall be permitted to obtain, use or benefit from goods and services through the use of their own assistive devices. We will ensure that our employees are trained and familiar with various assistive devices that may be used by persons with disabilities while accessing our good or services.

In the event that a person with a disability is hindered from accessing any goods or services offered, CaseWare will use its best efforts to accommodate the person by offering the use of another assistive device that is available or attempt to deliver the same service in another way.

3. Telephone Services

CaseWare is committed to providing fully accessible telephone service to our members. We will train employees to communicate over the telephone in clear and plain language and to speak clearly and slowly. If telephone communication provides a barrier to a person with a disability, we will be available to communicate in writing, by e-mail, by fax or by other electronic means.

4. Billing

We are committed to providing accessible invoices to all of our customers and will make every effort to provide alternative formats of invoices in a timely manner upon request.

Use of Services Animals and Support Persons

1. Service Animals

CaseWare is committed to welcoming persons with disabilities who are accompanied by a service animal on the parts of our premises that are open to the public. If a service animal is excluded by law, we will suggest appropriate alternatives and provide assistance in order to ensure that the person is able to access, obtain, use or benefit from CaseWare's services where possible.

CaseWare will train employees on how to interact with customers who are accompanied by service animals.

2. Support Persons

Any person with a disability who is accompanied by a Support Person will be allowed to access any services provided by CaseWare with his or her Support Person. We will not prevent a person with a disability who is accompanied by a Support Person from having access to his or her Support Person.



Where there are barriers to access or attendance by a Support Person, CaseWare will seek to facilitate access to ensure the participation of persons with disabilities.

Notice of Temporary Disruptions

Although CaseWare is aware that the operation of its services and facilities is important to its customers and that persons with disabilities rely on certain services and facilities provided by CaseWare, temporary disruptions in services and facilities may occur from time to time.

CaseWare will provide notice when there is a temporary disruption in those services or facilities that persons with disabilities may rely on. This notice will include information about the reason for the disruption, its anticipated duration, and, if applicable, a description of alternative facilities or services that may be available. Notice of service disruptions will be provided as soon as reasonably practicable after CaseWare is made aware of the disruption, or in advance in the case of planned disruptions.

Notice will be provided by a variety of methods, depending on the circumstances, and may include postings in conspicuous places at the office, in other facilities of the building (i.e. the lobby), on our website or by any other means that will reasonably ensure that the notice reaches those persons potentially affected by the temporary disruption in a manner that is accessible to them.

Training of Staff

CaseWare will ensure that all employees, agents and third parties who interact with customers on its behalf receive AODA Customer Service Standard Training. Further, training shall be provided on an ongoing basis whenever changes are made to this Policy to ensure that this Policy is properly implemented at all times.

Training will include the following:

- An overview of the purposes of the *Accessibility for Ontarians with Disabilities Act, 2005* and the requirements of the Customer Service Standard;
- Training on how to interact and communicate with people with various types of disabilities;
- Training 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;
- Training on how to use equipment or assistive devices available at the office or otherwise provided by CaseWare that may help with the provision of goods or services to a person with a disability;
- Training on what to do if a person with a disability is having difficulty in accessing CaseWare's goods and services; and
- Training on CaseWare's current policies, practices and procedures relating to the Customer Service Standard.



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CaseWare will keep records of the training provided, including the dates on which training was received and the names and number of participants.

Feedback Process

Customers who wish to provide feedback on the way CaseWare provides goods and services to people with disabilities in a manner they deem most convenient to them. For example, a person may provide feedback, by completing a Customer Feedback Form, or by contacting the AODA Compliance Officer in person, by mail, phone, email or by diskette.

The author of the feedback will be provided a response in the format requested (or the most appropriate format where no request was made) outlining actions taken. CaseWare shall make best efforts to respond to feedback within five (5) business days. Complaints will be addressed according to our organization's regular complaint management procedures.

Any Enquiries related to this policy and any feedback should be directed to CaseWare's AODA Compliance Officer:

Name: Barbara Moy Phone: (416) 867-9504 ext. 1294

Email: barbara.moy@caseware.com Fax: (416) 867-1906

Address: CaseWare International Inc.
469 King Street West, Suite 200
Toronto, ON
M5V 1K4

Multi-Year Accessibility Plan

This 2014-21 accessibility plan outlines the policies and actions that CaseWare International Inc. will put in place to improve opportunities for people with disabilities.

Statement of Commitment

We at CaseWare are committed to making our offices and services accessible. We want to create an environment that promotes inclusion and accessibility.

Our goal is to communicate effectively with persons with disabilities in a manner that takes into account circumstances, special needs; including the use of assistive devices. We are working toward ensuring that our policies, practices and procedures are consistent with the core principles of dignity, respect and independence.



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CaseWare encourages a workplace in which all employees can reach their full potential. We are committed to reaching through barriers to attract the brightest, most innovative and dedicated people to join our family.

This is an ongoing process, and we welcome your comments and suggestions regarding the accessibility of our services.

Accessible Emergency Information

CaseWare International Inc. is committed to providing the customers and clients with publicly available emergency information in an accessible way upon request. We will also provide employees with disabilities with individualized emergency response information when necessary.

Training

CaseWare International Inc. will provide training to employees, volunteers and other staff members on Ontario's accessibility laws and on the Human Rights Code as it relates to people with disabilities. Training will be provided in a way that best suits the duties of employees, volunteers and other staff members. Please refer to our policy on the Customer Service Standard (CSS Policy).

CaseWare International Inc. will take the following steps to ensure employees are provided with the training needed to meet Ontario's accessible laws by **January 1, 2015**:

- At present, every employee identified in the "Training of Staff" section outlined in our CSS policy has complied with training.
- Any future hires in these departments will be required to complete AODA training.

Information and communications

CaseWare International Inc. is committed to meeting the communication needs of people with disabilities. We will take the following steps to make all new websites and content conform with WCAG 2.0, Level A by **January 1, 2014**:

- We will work with our marketing team to have any new content comply with WCAG 2.0 requirements



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- Existing web content will undergo conformity. We will aim to have our website comply with WCAG 2.0 level AA by **Jan 1, 2021**.

CaseWare International Inc. will take the following steps to ensure existing feedback processes are accessible to people with disabilities upon request by **January 1, 2015**:

- We have updated our CSS Policy (below) to include multiple methods to provide feedback (telephone, fax, email, mail and drop in)

CaseWare International Inc. will take the following steps to make sure all publicly available information is made accessible upon request by **January 1, 2016**:

- We will work with our documentation team to ensure information can be provided in alternative formats.
- Requests can be sent to the compliance officer listed in our CSS Policy.

Employment

CaseWare International Inc. is committed to fair and accessible employment practices.

We will take the following steps to notify the public and staff that, when requested, we will accommodate people with disabilities during the recruitment and assessment processes and when people are hired:

- Providing accommodation so long as it does not create an undue financial hardship

CaseWare's Accommodation Policy

The purpose of the Accommodation Policy is to ensure that we provide accommodation to employees, clients and potential applicants in accordance with the Ontario Human Rights Code. By providing accommodation, we are helping to create an inclusive environment.

Anyone requiring accommodation may direct their requests to the People & Culture department by emailing barbara.moy@caseware.com or calling 416-867-9504 ext 1294. Written requests are also welcomed. Anyone requesting accommodation will be required to identify their needs and to provide information about capabilities and restrictions in order to validate requests for accommodation.

People & Culture will assess all requests on a case by case basis and will explore options for accommodation. All accommodation-related information will be kept confidential except where disclosure is necessary.



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If you have identified an accessibility barrier, we want to know. Please contact us below.

In the event of a service disruption, we will notify the public of the service disruption and alternatives available. Please also refer to our CSS Policy.

For more information

For more information on this accessibility plan or to request an alternative format, please contact:

Name: Barbara Moy Phone: (416) 867-9504 ext. 1294

Email: barbara.moy@caseware.com Fax: (416) 867-1906

Address: CaseWare International Inc.
469 King Street West, Suite 200
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Modification to the Policy and Related Policies

CaseWare is committed to developing customer service policies that respect and promote the dignity and independence of people with disabilities. All of CaseWare's policies and procedures will be developed or updated in such a manner as to respect and promote the dignity and independence of persons with disabilities.