ERGONOMICS MATCHING FUNDS PROGRAM PROCEDURE

CSU Ergonomics Program
Office of Risk Management & Insurance
141 General Services Building
Fort Collins, CO 80523-6002
rmi.prep.colostate.edu/ergonomics
Contents

1. Background
2. Matching Funds Reimbursement
3. Financial Need
4. Funding Availability
5. Where is Matching Funds Applicable?
6. Purchasing Equipment
7. Criteria for Obtaining Matching Funds
8. How are Matching Funds Processed?
9. Recommended Matching Funds Process Flow
10. Definitions
11. Contacts
12. Ergonomics Program Resources
Background

The Colorado State University (CSU) Office of Risk Management and Insurance (RMI) Ergonomics Program offers potential funding of **up to $500 dollars** per employee in matching funds (50% of total equipment cost) to modify existing office computer workstations to provide departments a cost-effective method of injury prevention.

Matching Funds Reimbursement

The Risk Management and Insurance Department will match up to 50% (up to a maximum of $500 in total reimbursement) for ergonomic equipment costs for approved applicants. The department requesting matching funds is responsible for 100% of the initial purchase of equipment. Funding reimbursement of any kind will not be provided to the department until all appropriate documentation and application materials are received by the employee requesting funds.

Once all matching funds criteria have been met and all application materials have been submitted and have received final approval (from the approval committee), reimbursement of up to 50% (up to $500 in total reimbursement) will be provided to the department (as funding is available). The department is responsible for payment of 50% of the desired equipment cost as well as any additional cost exceeding Risk Management's match. For example – applications which have a total cost exceeding $1000 will only receive the maximum of $500 in reimbursement from Risk Management regardless of the total equipment cost amount (which can exceed $1000).

More than one piece of equipment/product can be included on the matching funds application (i.e. chair and keyboard and mouse, etc.); however, reimbursement will only be provided for multiple equipment items up to the $500 maximum reimbursement.

Total matching funds reimbursement shall not exceed $500 per employee per fiscal year. Only one request per employee per fiscal year is allowed however applications may be submitted in subsequent years by the same employee. Requests for funding will be considered on a first-come first-served basis depending on funding availability. Additional information on funding availability is below.

Financial Need

Any employee can request matching funds so long as that request is made to ergonomically improve a workstation or eliminate an identified ergonomic hazard in the office environment where the department may be unable to obtain the equipment with their current financial situation. However, the department must be able to demonstrate a need for the equipment as well as justify the request for financial assistance. The department must provide justification for the financial need within the matching funds application. Formal requests are unnecessary however written explanation justifying the financial need within the application itself is necessary.
**Funding Availability**

Funding which is available for the ergonomics matching funds program is limited each fiscal year and when all available funds have been utilized, no further funding will be made available to any department until subsequent fiscal years. Once an employee has made a request and submitted application materials for matching funds, the request will be reviewed regardless of remaining funds available for the program in a given fiscal year. However, if no further funding remains in the matching funds program in the current fiscal year, the request for matching funds (if approved) will be addressed when and if funding is available in subsequent fiscal years. The requested matching funds reimbursement will only be provided to the department after all requested documentation has been received and final approval granted.

**Where is Matching Funds Applicable?**

Only Colorado State University employees are eligible to apply for matching funds reimbursement. Non-CSU employees are not eligible. Employees requesting matching funds must complete the application individually as the matching funds applications are electronic and are linked to each employees unique CSUID. Although an employee must apply individually, funding reimbursement can only be made to the employees department. Employees are **not** eligible for personal funding reimbursement (i.e. non-CSU affiliated workstation/environment for personal use).

Funding for the office ergonomics matching program may only be applied to an office computer workstation environment. Environments such as laboratories, warehouses, stock rooms, and point of sale computer related environments are only a few examples of where the office ergonomics matching funds may **not** be applied. If there is uncertainty about a specific work environment where matching funds may apply, contact the ergonomics office **prior** to applying to determine eligibility.

Requested matching funds cannot be applied to computer workstation furniture for new construction, renovation, and relocation projects. However, modifications to an existing office computer workstation may be acceptable (i.e. replacing a portion or section of existing desk/workstation to allow alternating between sitting and standing). These requests, as well as other unusual requests for matching funds, will be reviewed on a case by case basis.

Purchases made for items, furniture or equipment **must** be approved by the Ergonomics Program Manager prior to purchase. Items not listed on the matching funds application **may not** be eligible for reimbursement. Products purchased without prior approval will **not** be eligible for matching funds reimbursement. For a list of recommended ergonomic products go to the Ergonomics Program webpage – [Approved Ergonomics Equipment](#)

Applications which are incomplete may be delayed or denied.
**Purchasing Equipment**

Purchases of equipment can take place at any time a department so chooses. Reimbursement of funds will only take place following the departments’ purchase of equipment and/or furniture, and as mentioned, the requesting department is responsible for 100% of the initial purchase of equipment.

It is recommended that if equipment, furniture, etc. is needed to ergonomically improve a workstation/environment for an employee, that the purchase and implementation of equipment, furniture, etc., take place as soon as possible. Funding reimbursement takes place at a later time regardless and because of funding limitations, reimbursement can be further delayed. Ideally, funding reimbursement should not delay when changes are made to a workstation/environment.

Following approval of the matching funds application, employees will be notified via email of their successful application and will be provided further directions on how to proceed forward. If purchase of the equipment has not already taken place, the department may proceed forward with purchase. A CSU ergonomics specialist may have given suggested vendor information, product ID numbers, etc. to an employee, however it is the responsibility of the employee/employee’s department to obtain exact prices, verify model numbers, etc. Exact product information, total prices, including installation fees, shipping and handling, etc. must be included in the matching funds application so that proper funds can be allocated.

To obtain pricing information, the employee/department should contact the vendor(s) and request a price quote, check the vendor(s) website, etc. Pricing for certain items (such as tables, desks, chairs) may also be available on the CSU Kuali system website. Employees should contact their departmental accounting person for assistance with the purchase of equipment. The CSU Ergonomics Program is not a vendor or distributor and does not sell or purchase equipment for other university employees or departments.

Following purchase of equipment by the department, the requesting employee will be required to provide the proofs of purchase on their matching funds dashboard. The Kuali document number(s) is required for proof(s) of purchase. To obtain the Kuali document number(s), the requesting employees should contact their departmental accounting person.
Criteria for Obtaining Matching Funds

In order to obtain matching funds reimbursement the departmental employee must meet the criteria listed below. Employees applying for funds are responsible for tracking their progress and ensuring certain criteria are met within the allotted time frames. Progress can be tracked through the “matching funds dashboard”. The matching funds dashboard, which is specific to each employee, allows employees to review their application status, evaluation and training status, due dates, etc. As a step is completed, the “status” notification for that step will be updated. When all criteria have been met, the application materials will be electronically sent to the approving committee for final review.

If listed criteria are not met within the allotted time frames, the application will be denied and the employee will be forced to re-apply. (The schedule-by or expiration dates were put in place to ensure quicker movement through the process and to avoid holding up funds, if an employee is not going to complete each step in the process in a timely manner).

Matching Funds Dashboard

Instructions

It is your responsibility to ensure each of the below criteria have been completed within the allotted time frames listed. If you do not fulfill the criteria within listed time frames, your application will be void and you will have to complete the process once again.

1. Please complete the Matching Funds Application accessible by means of the links below.
2. Your matching funds application will only be submitted after you have met all other matching funds criteria including - Attendance at an Office Ergonomics Training session and Completion of an Office Ergonomic Evaluation. Note that items expire after the following durations:
   • Application - 90 days
   • Ergonomic Evaluation - 12 months
   • Office Ergonomic Training - 5 years
3. After the matching funds application has been submitted, it will be submitted for final approval. The evaluation report will detail both injury risk factors and recommendations and will be submitted to the Physical Safety Subcommittee (PSS) for final review.

Matching Funds Status for: Frank Gonzales

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Status</th>
<th>Date</th>
<th>Most Schedule By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>INCOMPLETE</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Ergonomics Evaluation</td>
<td>INCOMPLETE</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Ergonomist Training</td>
<td>INCOMPLETE</td>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>

1. Complete - Step completed (no further action necessary on your part)
2. Incomplete - Action needed (further action is necessary on your part)
3. Pending - Processing (no further action is necessary on your part)
Below is a more detailed description of the requirements of the matching funds program.

**Training**
- Employees must attend a CSU office ergonomics course. A list of courses can be found on the Ergonomics webpage [http://rmi.prep.colostate.edu/ergonomics/ergonomics-training/](http://rmi.prep.colostate.edu/ergonomics/ergonomics-training/) as well as by clicking the appropriate link on the matching funds dashboard.
  - Employees must have a clear understanding of office ergonomics, signs and symptoms of injury, potential injury risk exposures associated with work in the office environment and how to ensure an appropriate ergonomic workstation setup.
    - Employees are required to attend the in person, instructor-led training. This training is hands-on and allows the employee to try equipment and learn how to adjust it properly. This also allows the instructor to see that the employee is successful in the adjustments being made.
  - Attendance at a CSU office ergonomics training course must have taken place within the previous 5 years from the date of the matching funds application. Dates of training (if completed) are listed on the matching funds dashboard.
  - Employees requesting matching funds must sign up for an office ergonomics training course within 3 months of their submission of the matching funds application. Failure to do so will result in denial of the application.

**Evaluation**
- Employees must have an ergonomic evaluation performed within the last 12 months of the request for matching funds.
  - Click [here](http://rmi.prep.colostate.edu/ergonomics/ergonomics-training/) to schedule an office ergonomic evaluation
    - The date of the most recently evaluation is listed on the matching funds dashboard.
  - A qualified member of the CSU Risk Management Ergonomics team must perform the ergonomic evaluation.
  - Employees requesting matching funds must schedule an ergonomic evaluation within 3 months of their submission of the matching funds application form. Failure to do so will result in denial of the application. (The evaluation does not need to be completed within 3 months but the evaluation request form must be submitted on the website).

**Application**
- Employees must complete a [Matching Funds Application](#) (The application can be accessed through the matching funds dashboard).
  - An application can be submitted prior to other matching funds criteria including ergonomic evaluation and training. See below*
  - After the ergonomics program manager has received the matching funds application, an ergonomic evaluation should be requested/scheduled, (if not already completed). The evaluation report will be submitted and reviewed by the ergonomics program manager and then submitted to the approving committee for final review.
Equipment Trial

- Employees should try the desired piece of ergonomic equipment, furniture offered through the Ergonomics Loan Program (if available).
  - It is **recommended** that ergonomics products be seen and tried before purchase to ensure they are appropriate for the employee.
  - The Ergonomics Loan Program allows employees to try recommended ergonomic office products that are available at no charge to the department. For a list of recommended products, go to the following website. Not all products listed are available for trial. [http://www.ehs.colostate.edu/WErgo/ErgoItems.aspx](http://www.ehs.colostate.edu/WErgo/ErgoItems.aspx)
  - Along with trial equipment (if available), CSU provides an ergonomics “showroom/lab” which contains a variety of equipment and furniture for review and trial. The ‘ergolab’ is available by appointment only. Contact Frank Gonzales to schedule a visit.
  - If equipment or furniture is desired for purchase but is not part of the Recommended/Approved CSU Ergonomics Equipment list, it must be reviewed and approved by CSU Ergonomics Program staff before it will be considered for reimbursement as part of the matching funds program. Purchases of equipment or furniture that are not approved by CSU Ergonomics Program staff may be denied for matching funds reimbursement.

*A matching funds application may be submitted **prior** to receiving an ergonomic evaluation and/or attending a training session. However, employees requesting matching funds should have scheduled an ergonomic evaluation and registered for a training session within 3 months of their submission of the matching funds application form. Failure to do so may result in denial of the application.*

**How are Matching Funds Processed?**

When all criteria have been met (ergonomic evaluation, training attendance, completion of the application) the process will be complete. Thereafter, the application and other pertinent materials will be submitted to the CSU Occupational Health (OH) Committee for final approval. Final decisions on whether the request for funds has been approved and funding reimbursement will provided to the department will be made by the OH Committee as soon as possible but only after all matching funds criteria have been met and all application materials received. If approval is granted, the employee/department will be notified via email and must then provide necessary purchasing documentation so that funding reimbursement can be provided.
**Recommended Matching Funds Process Flow**

Below is not the mandatory process for matching funds reimbursement eligibility, however, this is the recommended course of action. Adjustments may need to occur for various reasons (i.e. ergonomics training sessions will not fit an employee’s schedule). Click the buttons below (if applicable) for additional information and shortcuts to the appropriate webpages.

1. **Register for and Attend an Office Ergonomics Training Course** (click here)
2. **Schedule & Complete an Office Ergonomic Evaluation** (click here)
3. **Visit the Ergonomics Lab/Showroom**
   - Select and try desired equipment (if feasible) (click here)
4. **Obtain price quotes from vendors, distributors**
   - (CSU Ergo Program is not a distributor) (click here)
5. **Ergonomics Coordinator Reviews all application materials and submits for final approval**
6. **Submit Ergonomics Matching Funds application**
   - Include selected equipment verified during ergo lab visit
7. **OH Committee Reviews and provides final approval**
8. **After final approval, enter proof(s) of purchase (Kuali document #) on the Matching Funds Application Webpage**
9. **After proof(s) of purchase provided, funding reimbursement of 50% up to $500 provided to department**
Questions?

Contact Frank Gonzales - (970) 491-2724
Frank.Gonzales@colostate.edu or ergo@colostate.edu

Definitions

- Ergonomic Stressors/Ergonomic Hazards - Any condition that poses a biomechanical stress on the human body associated with an increased risk for developing musculoskeletal disorders.

Contact Information

FRANK GONZALES
ERGONOMICS PROGRAM MANAGER

Tel 970-491-2724
Fax 970-491-4804
Frank.Gonzales@colostate.edu
http://rmi.prep.colostate.edu/ergonomics/

Last updated: 11/1/2018