

# POLICY PROTEC

## 2025 Catalogue



## What We Do

We provide Canadian organizations with the policies, procedures, and related resources required to:

- Achieve regulatory compliance
- Control risk
- Engage and direct employees
- Drive results

## Why Use Us

1. Canadian organizations swim in an ocean of regulatory requirements. Every policy we write includes the content your organization needs to demonstrate due diligence and follow the law.
2. People need policies that are easy to understand. Every policy we write is **intentionally precise**. This means your employees can easily find the information they need and trust that it is correct.
3. We start where you are. Whether you need just a few policies, or require a complete document overhaul, we provide the documents you need, tailored to your organization and culture.
4. We don't lock you into a subscription for documents you'll never use. We provide just the documents you need for a fixed, one-time price.

## Document Examples

Click or scan the QR code below to see examples of our industry-leading policies, procedures, employee handbooks, and safety manuals.



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## Contact Us

Let's discuss your goals and requirements.  
Contact us to schedule a discovery conversation.

- 587-372-7777 (Canada)
- <https://policyprotec.com/contact>



Good governance begins with valid policies. Get the governance and operational documents you need, customized exactly to your organization.

### **Governance Policies**

- Board committees policy
- Board communications policy
- Board conflicts of interest policy
- Board development policy
- Board governance policy
- Board member compensation, travel, and expenses policy
- Board self-evaluation policy
- Donations and gifts policy
- Indigenous peoples engagement policy
- Officers' accountability policy

### **Specialty Documents**

- Code of ethical conduct
- Corporate or society bylaws
- Incident reporting playbook

### **Operational Policies**

- Accessibility policy
- Customer service policy
- Ethical sourcing policy
- External communications policy
- Intellectual property policy
- Physical assets policy
- Purchasing policy
- Quality policy
- Vehicle usage policy
- Whistleblower policy, external

### **Operational Procedures**

#### **General**

- Customer complaint procedure
- Return authorization procedure
- Whistleblower investigation procedure, external

#### **Purchasing**

- Competitive bids purchasing procedure
- Open tendering purchasing procedure
- Purchasing procedure
- Request for proposals purchasing procedure
- Sole source purchasing procedure



Set your people up for success. Provide comprehensive, trustworthy employment policies, procedures, handbooks, and job aids.

### **Employment Policies**

- Attendance and time off policy
- Compensation and benefits policy
- Conflicts of interest policy
- Disconnecting from work policy
- Diversity, equity, and inclusion policy
- Duty to accommodate policy
- Employee information policy
- Hiring policy
- Issue resolution policy
- Pay equity policy
- Professional development and training policy
- Progressive discipline policy
- Remote working policy
- Whistleblower policy, internal

### **Employee Handbook Chapters**

- Attendance and time-off chapter
- Company history, vision, and mission chapter
- Compensation and benefits chapter
- Employment administration chapter
- Expenses and business travel chapter
- Performance management chapter
- Talent acquisition chapter
- Training and development chapter

### **Employment Procedures**

- Accommodation request procedure
- Benefits claim procedure
- Document distribution and attestation procedure
- Employee onboarding and offboarding procedures
- Issue resolution procedure
- Performance improvement procedure
- Recruitment and selection procedure
- Time off request procedure
- Visitor orientation procedure
- Whistleblower investigation procedure, internal

### **Forms and Checklists**

Job aids are forms and checklists that support consistency and provide auditable records.

- Functional abilities assessment form
- Modified duties and return to work plan
- New employee onboarding checklist
- On-the-job training plan and record form
- Performance improvement process form
- Time off request form
- Visitor orientation checklist
- Volunteer orientation checklist
- Whistleblower report form



## Health and Safety Documents

We provide the full range of health and safety documents. Everything is fully customized to your industry, workplaces, jobs, and tasks.

- Administrative procedures manual
- Building-specific fire safety plans
- Emergency response procedures manual
- Forms and checklists
- Hazards and controls risk register
- Health and safety policy manual
- Health and safety records and statistics workbook
- Health and safety system manual
- Joint workplace health and safety committee terms of reference
- Safe operating procedures manual
- Safe work practices manual
- Workplace violence and harassment prevention plans

## Services

We are Canadian health and safety experts. Let us help you with:

- Health and safety system assessment
- Formal hazard assessment
- COR-certification consulting

## HSE Policies

We have the policies you need to manage your health and safety function, including:

- Blood and bodily fluids exposure policy
- Contractors and visitors policy
- Corrective actions policy
- Drugs and alcohol policy
- Emergency preparedness and response policy
- Environmental protection policy
- Food safety policy
- Hazard assessment and control policy
- Health and safety governance policy
- Health or safety incidents policy
- Inspections policy
- Maintenance policy
- Pandemic response policy
- Personal protective equipment policy
- Psychological health and safety policy
- Qualifications and training policy
- Remote working / working from home policy
- Sharps handling policy
- Tobacco in the workplace policy
- Vaccinations policy
- Visitors policy
- Volunteer and student safety policy
- Weapons in the workplace policy
- WHMIS policy
- Worker participation in health and safety policy
- Working alone policy
- Workplace harassment and discrimination policy
- Workplace impairment policy
- Workplace violence policy

## Emergency Response Procedures

Emergency response procedures are designed to assist workers in actual emergency situations.

- Anaphylaxis first aid procedure
- Blood or bodily fluid contact procedure
- Bomb threat procedure
- Building evacuation procedure
- Building lockdown procedure
- Chemical spill procedure
- CPR procedure
- Defibrillation (AED) procedure
- Diesel positive air shut-off procedure
- Emergency message fan-out procedure
- Environmental spill procedure
- Medical emergency procedure
- Naloxone first aid procedure
- Physical fight procedure
- Robbery / hold-up procedure
- Sharps injury first aid procedure
- Shelter in place procedure
- Site evacuation procedure
- Vehicle accident procedures

## Administrative Procedures

Documented administrative procedures support consistency at all your worksites.

- Formal hazard assessment procedure
- Incident investigation procedure
- New employee health and safety orientation procedure
- On-the-job training procedure
- Site-specific hazard assessment procedure
- Workplace harassment or discrimination investigation procedure
- Workplace violence investigation procedure

## Forms and Checklists

- Commercial vehicle inspection checklist
- Contractor orientation checklist
- Equipment operator certification checklist
- Estimators' site hazard assessment form
- Field-level hazard assessment form
- Functional abilities assessment form
- Home visit hazard assessment
- Home-office hazard assessment
- Incident investigation form
- Incident witness report form
- Injury classification form
- Modified duties / return to work form
- New employee orientation form
- Passenger vehicle inspection checklist
- Site daily safety planning form
- Visitors' sign-in and sign-out register
- Worksite inspection checklist and form

## COR™ Certification

POLICY PROTEC provides organizations with the documents and guidance required to achieve the COR health and safety certification.

Using our proprietary documents, you will achieve COR a fraction of the time required to do the work in-house—and with better results.







We provide the policies, procedures, and standards required to manage, secure, and use information. Get ISO 27001-ready resources you need to manage your information function.

### Information Technology Policies

- A.I. usage policy
- Acceptable use of information technology policy
- I.T. asset management policy
- I.T. change management policy
- I.T. equipment disposal policy
- I.T. project management policy
- I.T. risk management policy
- Personal devices usage policy
- Software assets policy
- Wireless networking administration policy

### Information Security Policies

- Business continuity policy
- Clear screen / clear desk policy
- Electronic monitoring policy
- I.T. physical security policy
- Information incident or breach policy
- Information security accountability policy
- Information security policy
- Information security risk assessment policy
- Patch and vulnerability management policy
- Remote access policy
- Service credentials policy

### Information Management Policies

- Digital signature acceptance policy
- Document management policy
- Email policy
- Information classification policy
- Information records management policy
- Records and retention policy

### Procedures

- Administrator off-boarding procedure
- Administrator on-boarding or change procedure
- Business continuity procedures
- Disaster recovery procedures
- I.T. equipment disposal procedure
- I.T. solution implementation procedure
- Information destruction procedure
- Information incident or breach procedure
- Information security internal audit procedure
- User off-boarding procedure
- User on-boarding or change procedure
- Vendor selection procedure

### Standards

- Access logs standard
- Account lock-out standard
- Backup standards
- Device naming standard
- Encryption standards
- Information retention standards
- Software development standards



Get the policies and procedures required to effectively manage your privacy function.

### Privacy Protection Policies

- Access and correction of health information policy
- Collection, use, and disclosure of health information policy
- Data use evaluation policy
- Information security in contracting policy
- Personal and health information privacy policy
- Privacy and security audit policy
- Privacy and security risk management policy
- Privacy and security risks and mitigation policy
- Privacy breach management policy
- Privacy charter and principles
- Privacy impact assessment policy
- Protection of health information policy
- Records security classifications policy
- Use of health information for research policy

### Privacy Protection Procedures

- Amending or correcting health information procedure
- Disclosing health information for research procedure
- EMR activity audit procedure
- Evaluation procedure
- Fax number registration procedure
- Faxing procedure
- Manually recording the disclosure of health information procedure
- Privacy breach procedure
- Privacy impact assessment procedure
- Providing access to health information procedure
- Recording a patient's expressed wishes procedure
- Releasing health information procedure





Fiduciary due diligence begins with clear, comprehensive financial policies, procedures, and authorities.

### **Finance and Accounting Policies**

- Annual audit and auditors policy
- Anti-money laundering and terrorist financing policy
- Approval authorities policy
- Bank accounts and signing authority policy
- Basis of accounting policy
- Budget amendment policy
- Capital expenditure policy
- Cash management and investment policy
- Conflicts of interest (financial) policy
- Credit approval policy
- Discounts policy
- Donations and gifts policy
- Expense reimbursement policy
- Financial reporting and review policy
- Internal financial controls policy
- Operational stability fund policy
- Purchasing policy
- Risk management policy
- Segregation of duties policy
- Terms and conditions of sale and warranties policy
- Unbudgeted expenditures policy

### **Finance and Accounting Procedures**

- Accounts receivable procedure
- Business plan amendment procedure
- Capital expenditure request and approval procedure
- Cash receipts and deposits procedure
- Changes to budget procedure
- Competitive bids purchasing procedure
- Credit card procedure
- Expense pre-approval procedure
- Financial reporting and review procedure
- Invoice approval and payment procedure
- Monthly close procedure
- Open tendering purchasing procedure
- Requests for proposals (RFP) procedure
- Sole source purchasing procedure
- Timesheet review and approval procedure
- Unbudgeted expenditures procedure
- Vendor prequalification procedure
- Wire transfer procedure

### **Authorization Registers**

- Bank authorized signatories register
- Budgeted financial authorization limits register
- Financial payment authorization limits register
- Purchasing methods limits register
- Unbudgeted financial approval limits register

## Corporate Information

### Founder and President

Murray Whitby, M.Ad.Ed., BBA, CPHR

### Legal Name

POLICY PROTEC, a division of 2148068 Alberta Inc.

### Mailing Address

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P.O. Box 76097 Southgate  
Edmonton, AB T6H 5Y7

### Telephone

1-587-372-7777 (Canada)

### Website

<https://policyprotec.com/>

### Insurance Coverage

- Commercial general liability: \$1,000,000.
- Errors and omissions liability: \$2,000,000.

### Licensure

- Government of Canada business / GST number:  
72865 5985 RC0001
- City of Edmonton business license number:  
451141285-002

## Contact Us

Ready to get started? Click or scan the QR code below to contact us.

