

POLICY PROTEC

Document Catalogue

Version 2.4



Policies that protect.

What we do

We provide the policies, procedures, and associated documents Canadian organizations require to comply with the law, control risk, and engage employees.

Our documents are clear, coordinated, and customized to each client’s requirements.

How to use this catalogue

Whether you need a few policies to close a gap, or require a complete set of documents to achieve strategic objectives, POLICY PROTEC is the smart solution.

Use this catalogue as an idea generator. Identify the documents you require, then contact us for a quotation.

If you don’t see a document you need, not to worry: we’ll custom-develop exactly what you require.

And if you are not sure what your organization needs, contact us. We’ll assess the current state of your documents, discuss your goals, and provide recommendations you can trust.

Firm, fixed-fee quotations

We don’t lock you into a multi-year subscription for documents you’ll never use. We provide a firm, fixed-fee quotation for exactly the resources your organization requires. You pay for what you need, and nothing more.

About us

POLICY PROTEC is Canada’s leading boutique compliance consultant and policy developer. Our proprietary list-based policies are simply superior to longform documents and boilerplate downloads.

We proudly serve all Canadian sectors and industries.

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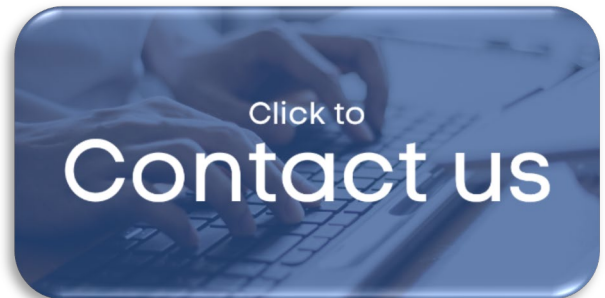
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Good governance begins with valid policies. We provide governance and operations documents exactly aligned to your sector, strategy, and culture.

Governance policies

- Board governance policy
- Board committees policy
- Board communications policy
- Board conflicts of interest policy
- Board development policy
- Board member compensation, travel, and expenses policy
- Board self-evaluation policy
- Donations and gifts policy
- Indigenous peoples engagement policy
- Officers' accountability policy
- And more, written specifically for your governance goals and structure

Specialty Documents

- Code of ethical conduct
- Incident reporting playbook

Operational policies

- Accessibility policy
- Accessible customer service policy (Ontario)
- Customer service policy
- Ethical sourcing policy
- External communications policy
- Integrated accessibility policy (Ontario)
- Intellectual property policy
- Physical assets policy
- Purchasing policy
- Quality policy
- Whistleblower policy, external
- And more, developed for specifically for your industry, operations, and requirements

Procedures

- Board member recruitment procedure
- Client complaint procedure
- Competitive bids purchasing procedure
- Open tendering purchasing procedure
- Purchasing procedure
- Request for proposals purchasing procedure
- Return authorization procedure
- Sole source purchasing procedure

Compliance drivers

- Accessibility law
- Accreditation standards
- Anti-SPAM law
- Competitive practices law
- Economic sanctions law
- Industry-specific regulations
- Insurance requirements
- Intellectual property law
- Whistleblower law



Set your supervisors and employees up for success. Give them comprehensive, trustworthy employment policies, procedures, handbooks, and job aids.

Policies

- Accommodation policy
- Attendance and time-off policy
- Compensation and benefits policy
- Conflicts of interest policy
- Diversity and inclusion policy
- Employee development policy
- Employee information policy
- Issue resolution policy
- Progressive discipline policy
- Talent acquisition (hiring) policy
- Whistleblower policy, internal
- Working from home policy

Procedures

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

Employee handbook chapters

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

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
- Volunteer orientation checklist
- Visitor orientation checklist
- Whistleblower report form

Compliance drivers

- Accessibility law
- Employment common law
- Employment standards
- Human rights law
- Labour relations law



Your organization is required by law to (a) protect the health and safety of workers and (b) protect the natural environment. Let us help you be a health and safety leader.

Services

- COR-certification consulting
- Formal hazard assessments
- Health and safety system assessments
- Live training

Health and safety system manual

POLICY PROTEC provides organizations wishing to achieve or renew the COR™ certification with, an enterprise health and safety system manual. The manual is completely customized to the organization and its industry, and contains the chapters listed below:

- Health and safety system overview chapter
- Safety roles and responsibilities chapter
- Qualifications and training chapter
- Health and safety committees chapter
- Hazard assessment chapter
- Hazard control chapter
- Preventative maintenance and inspections chapter
- Incident reporting and investigation chapter
- Emergency response chapter
- Health and safety system administration chapter
- Document management chapter

Policies

- Blood and bodily fluids exposure policy
- Contractors and visitors policy
- Corrective actions policy
- Drugs and alcohol policy
- Emergency preparedness policy
- Emergency response policy
- Environmental protection policy
- Food safety policy
- Hazard assessment and control policy
- Health and safety governance policy
- Health or safety incidents policy
- Home visits 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
- Transporting clients 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

Safe operating procedures

Our safe operating procedures follow a standardized format to ensure consistent execution of key health and safety procedures.

General procedures

- COVID-19 screening procedure
- Disaster response procedure
- Ergonomic assessment request procedure
- Fall protection system procedure
- Formal hazard assessment procedure
- Hard surfaces sanitization procedure
- Health and safety orientation procedure
- Incident reporting and investigation procedure
- Lock-out / tag-out procedure
- On-the-job training procedure
- Reporting to WCB / WSIB procedure
- Site-specific hazard assessment procedure
- Vehicle inspection procedure
- Vehicle refuelling procedure
- Visitors on site procedure
- Working alone check-in procedure
- Workplace harassment investigation procedure
- Workplace violence investigation procedure
- Worksite inspection procedure

Healthcare and social services procedures

- Blood or bodily fluids clean-up procedure
- Blood or bodily fluids exposure follow-up procedure
- De-escalation procedure
- Difficult patient / client procedure
- Home visit hazard assessment procedure
- Illicit drugs handling procedure
- Illicit weapons handling procedure
- Off-property emergency response procedure
- Sharps handling procedure

Emergency response procedures

Emergency response procedures are “grab-and-go”. They 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

Training videos

- Introduction to your health and safety system
- Workplace harassment and violence prevention

Safe work practices

Safe work practices provide the guidelines, the general “do’s and don’ts”, for a health or safety topic.

General safe work practices

- Facilities maintenance
- Fatigue management
- Fire prevention
- Healthy psychological boundaries
- Manual lifting and carrying
- Office ergonomics
- Safe work planning
- Severe weather hazards
- Slip, trip and fall prevention
- Working alone
- Working safely in heat
- Working safely in cold
- Workplace housekeeping

Equipment and Tools Safe Work Practices

- Defective tools or equipment
- Using air tools
- Using fire extinguishers
- Using ladders
- Using propane
- Using tools, equipment, and machinery

Food handling safe work practices

- Food safety
- Food and temperatures
- Kitchen

Driving and equipment operation safe work practices

- Backing or reversing equipment
- Backing or reversing vehicles
- Common driving hazards
- Defensive driving
- Journey management
- Logging work and driving hours
- Operating track-mounted vehicles on off-road sites
- Operating trucks on off-road sites
- Refueling
- Securing loads
- Spring road bans
- Winter driving

Industrial safe work practices

- Electrical contracting
- Elevated work platforms
- Energy control
- Environmental spill prevention
- Fall protection
- Ground disturbance
- Moving equipment by helicopter
- Noise mitigation
- Overhead power lines
- Safe work planning near electrical hazards
- Site access permission
- Working in confined spaces
- Working in remote locations
- Working on ice
- Working on or near contaminated soil

Hazards and risks register

Organizations are required by law to conduct formal hazard assessments. We tailor a comprehensive hazard and risk register specifically for your industry, workplaces, and roles.

Biological hazards and risks

- Allergens
- Animal waste
- Bacteria / viruses / infectious disease
- Bedbugs / lice / ticks / cockroaches / other insects
- Blood and bodily fluids
- COVID-19 / pandemic
- Fungi / moulds
- Human feces / urine / vomit
- Mice / pests
- Sewage

Chemical hazards and risks

- Acids
- Active pharmaceutical ingredients (APIs)
- Bases / caustic substances
- Carbon monoxide
- Chlorine
- Cleaners, household
- Cleaners, industrial
- Cytotoxic drugs
- Drugs, illicit
- Drugs, prescription, general
- Drugs, prescription, hazardous
- Fumes / vapours / smoke / gasses
- Hydrogen sulfide
- Paint
- Pesticides
- Petroleum products
- Toxic chemicals

Physical hazards and risks

- Animals, domesticated / wild
- Clutter / inappropriate storage
- Combustible materials
- Confined spaces
- Driving
- Egress, poor / restricted
- Electric wiring
- Ergonomic hazards
- Explosive substances
- Extremely cold ambient temperatures
- Extremely hot ambient temperatures
- Fixed equipment
- Flammable substances
- Hidden tripping hazards
- Hot surfaces
- Icy stairs / ramps / sidewalks
- Intruders / trespassers
- Isolated / off-camera workplaces
- Lifting heavy loads
- Lighting, poor
- Lightning
- Low headroom
- Moving equipment / vehicles
- Noise, loud / sustained
- Power tools, use of
- Radiation
- Repetitive motions
- Sharps / needles
- Slippery footing
- Uneven floors / ramps
- Unwanted touching, sexual
- Vibration
- Violence, threatened, attempted, or actual
- Weapons, threatened or produced
- Working at heights
- Working in people's homes / suites

Psychological hazards and risk

- Behavioural escalation
- Compassion fatigue
- Continual change / novelty fatigue
- Damage to / theft of personal property
- Death of clients / patients
- Fatigue
- Harassment, bullying / intimidation / manipulation
- Harassment, sexual / unwanted attention
- Harassment, verbal abuse
- Shift work / long hours / on-call work
- Short-service employees
- Stress
- Vicarious trauma
- Working alone
- Working with intoxicated people
- Working with people with depression / anxiety
- Working with people with psychotic disorders
- Working with people with suicidal or homicidal ideation
- Young workers

Compliance drivers

- COR certification standards
- Environmental protection law
- Hazardous products law
- National Fire Safety Code of Canada
- Occupational health and safety law
- Traffic safety law
- Workers' compensation law

Forms and checklists

- Commercial vehicle inspection checklist
- Contractor orientation checklist
- Environmental protection laws
- Estimators' site hazard assessment form
- Field-level hazard assessment form
- Forklift operator certification checklist
- Functional abilities assessment form
- Home-office hazard assessment
- Home visit 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.

Information technology policies

- Acceptable use of information technology policy
- I.T. asset management policy
- I.T. change management policy
- I.T. equipment disposal policy
- I.T. operations security policy
- I.T. project management policy
- I.T. risk management policy
- Personal device prohibition policy
- Software assets policy
- Wireless networking administration policy

Information security policies

- Business continuity policy
- Clear screen / clear desk policy
- Disaster recovery policy
- I.T. physical security policy
- Information incident or breach policy
- Information security accountability policy
- Information security internal audit 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 on-boarding or change procedure
- Administrator off-boarding 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 on-boarding or change procedure
- User off-boarding procedure
- Vendor selection procedure

Standards

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

Compliance drivers

- Cyber security standards (e.g. ISO 27001)
- Cyber-security insurance
- Data protection law
- Privacy law



We provide the documents required to effectively manage the privacy and data protection function. Supporting custodians of financial and health information is a POLICY PROTEC specialty.

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

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

Compliance drivers

- Cybersecurity standards
- Data protection law
- Electronic medical records regulations
- Health information law
- Human rights law
- Privacy law
- Professional standards



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

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

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

Authority appendices

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

Compliance drivers

- Accounting standards and principles
- Anti-money laundering law
- Audit results
- Customs law
- Free trade law
- Securities law
- Taxation law

Contact us

We love providing options. Click the button below to:

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- Discuss the current state of your documents
- See examples of our documents
- Obtain a quotation



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