



*Thames Valley*  
**Family Health Team**

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# Employee Handbook

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Revision Date: December 2014

## Welcome to the Thames Valley Family Health Team

Thank you for being part of the Thames Valley Family Health Team (TVFHT), an umbrella organization that supports the patients of 15 physician groups in clinic locations across London/Middlesex, Elgin, and Oxford counties. The teams at these locations include primary care physicians working with an interdisciplinary group of health professionals such as administrative staff, dietitians, nurses, nurse practitioners, occupational therapists, pharmacists, psychologists, respiratory therapists, social workers, and specialists such as psychiatrists and geriatricians. It is our vision to enhance the wellbeing of the people of TVFHT. You play an important role in fulfilling this vision.

Our mission is to provide exceptional health care to our communities. We make a difference in people's lives by providing comprehensive, compassionate care that responds to the needs and expectations of our patients and families. We deliver primary health care, in addition to a wide variety of chronic disease management and health promotion and disease prevention programs, to approximately 155,000 (and growing!) patients.

As leaders in the provision of primary health care, trust for each other and mutual respect for the unique roles we play as colleagues and professionals is critical to our model of patient care. This TVFHT Employee Handbook will provide important information about policies and guidelines to guide employer and employee relations. It contains an overview of Human Resource practices and general information regarding rights, responsibilities and administrative practices.

In order to help our patients and families, we value working together as a team of professionals where the contribution of each team member is optimized in an atmosphere of camaraderie and collegiality. We make every attempt to provide supportive and positive employment for all. It is the responsibility of all employees to review, understand, and abide by the contents of this Handbook.

We value open and honest dialogue which promotes information sharing and supports collaborative problem solving. All questions about this Employee Handbook and the information it contains should be directed to your Manager<sup>1</sup>.

The physical structure of TVFHT requires open communication lines. We are a networked organization with small teams of staff working in different geographic locations. Every TVFHT employee is given a TVFHT email address and access to the Members' Only section of the TVFHT website (<http://www.thamesvalleyfht.ca>). Most staff members also have personal phone extensions and voice mail accounts.

It is the responsibility of all employees to monitor their electronic communication (i.e., email) on a regular basis as important (and often time sensitive) information will be shared in this way. This Employee Handbook and other Human Resource materials can be found on the Members' Only section of the website.

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<sup>1</sup> The term *Manager* is used throughout this handbook to identify your direct supervisor. In most cases this is a Site Coordinator. In some cases, people report directly to a Director or other individual. If you are unsure who this individual is in your case, please ask your Human Resources contact for clarification.



Thames Valley Family Health Team  
by the numbers

- 15 FHOs
- More than 100 physicians
- More than 100 staff
- Over 155,000 patients
- Over 22,000 previously unattached patients enrolled since 2007



# Mission, Vision and Values

Approved by the TVFHT Board of Directors – March 28, 2013

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## Mission

We are a dynamic primary health care network providing exceptional care.

## Vision

As leaders in the provision of primary health care, we will enhance the wellbeing of the people of Thames Valley.

## Values

*Patient and Family Centred Care:* We make a difference in people's lives by providing comprehensive, compassionate care that responds to the evolving needs of our patients and their families.

*Trust and Respect:* Trust for each other and mutual respect for the unique roles we play as colleagues and professionals is critical to our inter-disciplinary model of patient care.

*Collaboration and Teamwork:* In order to help our patients and families, we value working together as a team of professionals where the contribution of each team member is optimized in a professional atmosphere of camaraderie and collegiality.

*Honesty and Open Communication:* We value open and honest dialogue which promotes information sharing and supports collaborative problem solving.

*Accountability:* We accept our individual and team responsibilities and we meet our commitments. We take responsibility for our actions, our decisions and our performance as both team members and individual professionals.

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## Hours of Work and Compensation

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### Hours of Work

Your hours of work are specified in your employment contract. If you are a full-time employee, your regular hours are generally 7.5 hours per day, excluding unpaid lunch breaks, for a 37.5 hour work week. The following chart shows hours per work week for part-time employees.<sup>2</sup>



Generally, a work day starts between the hours of 0800 and 1000 and ends between 1600 and 1800 hours Monday to Friday. The needs of the location may require you to accommodate a schedule that includes occasional or regular evening or weekend hours.

You may work outside of the regular work hours set out above as appropriate to clinic and patient needs, but only upon prior approval by your Manager.

The amount and frequency of paid and unpaid breaks you take depend on the number of consecutive hours you work per day. If you have additional questions about breaks, please consult with your Manager.

### Paid Breaks

You are encouraged to take paid breaks during the day (see box below). If you do not take these breaks you do not receive extra compensation (i.e., you may not bank comp time, or save them for another day).



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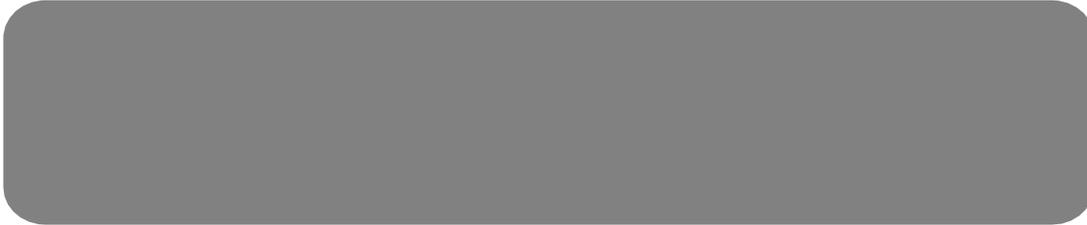
<sup>2</sup> In this document, a *work week* refers to the regular hours of work in a week according to your FTE allocation.

## **Unpaid Breaks**

You must not work for more than five (5) hours consecutively without taking a 30 minute unpaid meal break, free from work.

If you work five (5) or more consecutive hours, you must take no less than a 30 minute unpaid lunch break. You must take your lunch break no later than five (5) hours after the start of each work day, as per the *Employment Standards Act*.

You may not work through lunch in order to leave early at the end of the day.



## **Compensation**

Pay is distributed on a bi-weekly basis (26 pay periods per year). The pay period begins on Saturday and runs to the second Friday. You receive your pay by direct deposit the Friday following the end of the pay period.

## **Timesheets**

When you submit your timesheet through TimeTracker biweekly, you will receive your pay in a timely fashion. TVFHT has a responsibility to our employees and to our funder to be aware at all times of the liabilities associated with our payroll.

Every two weeks, submit your timesheet through TimeTracker no later than 4:00 p.m. on the Friday the pay period ends; pay is deposited by electronic funds transfer by 12:01 a.m. on the Friday of the following week. If your timesheet is late, inaccurate, or incomplete, your pay may be delayed to the next pay period. If you are unable to submit your timesheet due to extenuating circumstances (e.g., extended leave of absence, technical issues), please contact Human Resources.

Time is to be counted to the ¼ hour. For example, if you work 6 hours and 45 minutes in a day, you would record it as 6.75 hours.

Part of your initial orientation to employment with TVFHT includes general instructions on how to complete timesheets. Information on specific types of time, i.e., flextime, personal emergency days, vacation, professional development time, compassionate leave, statutory holidays, float days and additional hours worked can be found throughout this Handbook. If you have any further questions or concerns about the accurate completion of timesheets, direct them immediately to your Manager for clarification. If you have any questions or concerns after you have received your pay statement with details of your pay deposit, please contact the Human Resources Administrator.

## Flex Time

The needs of the patients are our primary concern, and you are encouraged to maintain a regular work schedule that meets these needs. If acceptable, however, to the requirements of your location, you may flex your regular schedule on rare occasions to maintain work/life balance. Your Manager must approve such an arrangement in advance.

When flexing time, you enter the actual paid hours worked each day on your timesheet.

## Compensating (Comp) Time

Sometimes, the needs of the patients and location will require you to work longer than your scheduled hours. In such circumstances, the extra hours will be reimbursed as straight comp time. Your schedule should be set up in such a way that this would occur only in exceptional circumstances. If this were to occur, you must enter the appropriate comment in your timesheet submission.

Comp time is not to be used as a regular method of modifying your schedule, or as a means to accumulate additional time off. If you are challenged to complete your work within the allotted time on a regular basis, please bring this to your Manager's attention for discussion. If you need additional time off for a particular purpose, please see the flex time section above.

Comp time should generally be used in the pay period in which it is earned, or the pay period immediately following, and at a time agreeable to both you and your Manager.



## Overtime

Overtime occurs for full-time employees when you work more than 44 hours per week. Your Manager must approve overtime in advance.

If you work overtime, you will be reimbursed with compensating time at a rate of 1½ times the overtime hours worked. The scheduling of compensating time will follow the policies established above.

*Example:* Joe worked 45 hours in the first week of the pay period, or 7.5 hours over and above his scheduled 37.5 hours per week. Joe will be compensated in work time as follows:

6.5 hours comp time (for extra hours worked that do not meet the definition of overtime)

1.5 hours overtime (1 hour of overtime worked times the 1½ overtime rate)

Joe receives a total of 8 hours comp time. Joe and his Manager agree that he will work 8 hours less the following week (or 29.5 hours).

## Office Closures

If a work location has a **planned** closure on a normal work day, you may schedule vacation, float days or personal [emergency](#) time, or make other arrangements with your Manager to make up the hours.

If a work location has an **unplanned** closure on a normal work day (some examples are flooding, fire, gas leak), please consult with your Manager on how to report your hours.

In the case of severe weather, the Inclement Weather Procedure ([Appendix 1](#)) will be followed.

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## Benefits

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We participate in all mandatory benefits programs in compliance with the *Employment Standards Act*. Your employment agreement letter also includes details on discretionary benefits<sup>3</sup>.

## Vacation

Vacation time allows you to have planned time away from work to achieve a work-life balance. The vacation year runs with the organization's fiscal year from April 1 to March 31.

The number of vacation days you receive and the timing of vacation increases (if applicable) are communicated to you when you are offered the job and sign your employment agreement.



As determined by the Board of Directors, the maximum vacation allocation is five (5) weeks for any TVFHT employee.



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<sup>3</sup> Note that contract employees are not eligible for discretionary benefits. Percentage payment in lieu of vacation time is offered and will be detailed in each individual contract employment agreement.

**PART-TIME EMPLOYEES:** Your vacation days are prorated according to your FTE allocation (see “Hours of Work” section on page 7). If your hours increase to a higher FTE allocation during the year, the vacation days will be prorated to your start/anniversary date. Any change in FTE will be accompanied by a letter that outlines your new vacation allocation.



Your vacation benefits are based on the number of years’ experience within TVFHT. **Past experience is credited** towards vacation days as follows:

Past non-comparable experience

- No credit

Past relevant<sup>4</sup> experience

- 5 years of external experience = 1 year TVFHT experience

Past experience in same capacity

- 2 years’ external experience = 1 year TVFHT experience

Past RN experience for current NP

- 3 years’ RN experience = 1 year NP experience



When you wish to take your vacation time:

- The rules of the location where you work determine how vacation days will be used. The Manager must ensure that a process exists so that other employees within the location are informed when each employee requests time off. If there is a conflict over requests for vacation time, for example, too many people at a location want the same time off, the Manager will resolve the dispute within the location.
- Any time away from work that exceeds a two (2) week continuous absence requires a completed Leave of Absence form, signed by your Manager and submitted to Central Office to the Human Resource Administrator who will obtain the approval from the appropriate Director.
- Vacation requests are to be submitted for approval at least 14 days prior to the first date of the block of vacation.

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<sup>4</sup> The Human Resources Administrator in consultation with the Director responsible for the area you are hired into will determine what experience qualifies as “relevant” or “same capacity”. Internship time is included in this determination.

**The following conditions apply to the use of vacation time:**

- You must submit no later than March 1 a request to the Human Resources Administrator to carry forward vacation days from one fiscal year to the next. No more than one week’s worth of vacation (the definition of one week is your FTE equivalent work week) can be carried over from a previous year. All unused vacation days (other than the one week carryover) must be used by March 31. As per the Employment Standards Act, the employer has the right to schedule vacation. TVFHT normally will not schedule an employee’s vacation, but reserves the right to do so if an employee has not made appropriate plans to use vacation within the fiscal year, in a way that is compliant with the direction provided in this Handbook.
- At the beginning of each new fiscal year (April 1), all employees have access to their full vacation entitlement.
- If a vacation is disrupted by illness or bereavement, you may, at your discretion, reschedule vacation days, subject to the approval of your Manager and with verification of the interruption (e.g., medical note).
- Vacation will not be paid out in cash except for any outstanding balance on the date you leave the employ of TVFHT.
- If you leave TVFHT part-way through the fiscal year, you must have only taken vacation equivalent to what you have earned up to your last scheduled day of work. If you have taken more vacation than you have earned (or are otherwise in a negative balance for vacation), you are responsible for paying the organization back for that time.

**Statutory Holidays**

We observe the following paid public holidays:



You will not work on these days unless approved by your Manager in advance. If a paid holiday falls on a Saturday or Sunday, TVFHT assigns the date on which the holiday will be observed. The observed date is announced no less than 90 days before the paid holiday.

All employees receive time off for statutory holidays regardless of whether you are normally scheduled to work on that day. The amount of paid time is determined by your normal work week as detailed in the chart on page 7.

If you did not have paid time equivalent to your normal work week in all of the four weeks preceding the statutory holiday, the calculation (as detailed in the *Employment Standards Act*) is the amount of paid time in the previous four weeks divided by 20.



You are responsible for ensuring that your worked hours plus non-worked statutory hours total your normal hours for the pay period that the holiday falls in.



**Float Days**

All employees are eligible to receive two float days per fiscal year, prorated to your start date and FTE allocation. Float days cannot be carried forward between fiscal years. Use of float days must be approved by your Manager in advance.

## Personal Emergency Days

Each full-time employee has access to a maximum of five (5) fully paid personal emergency days, or to a maximum of 37.5 hours, per fiscal year (from April 1 to March 31). If you require additional time, you have the option to take up to five (5) additional personal emergency days, paid at 75%. Any additional personal emergency days are unpaid.

Personal emergency days are not to be used when you want a day off, a day to run errands or to work at another job. Vacation and Float days are to be used for these purposes (see page 10 for more information).



**PART-TIME EMPLOYEES:** If you are at 0.5 FTE or more, you receive full personal emergency days except for any partial years of employment. If you are less than a 0.5 FTE, personal emergency days will be pro-rated and the details of the pro-rating are in your employment letter.

Your Manager may ask for proof of the need for the leave, for example, a doctor's note.

Personal emergency days are not paid out, nor can they be carried over to a subsequent year. Personal emergency days are a benefit to be used only if needed.

Your Manager will administer this protocol. You will notify your Manager as soon as you are aware that you need to take a personal emergency day, or at least 30 minutes before the beginning of your work day, in all but the most extreme cases.

## Professional Development

Each full-time employee has access to up to five (5) paid days of professional development time. For employees at 0.5 FTE or more, professional development time is not pro-rated, except for any partial years of employment. For employees with less than 0.5 FTE, allocation for professional development time will be allocated as below:



TVFHT has an annual budget to pay for employee development including workshops, conferences and other training opportunities. We consider an educational event for full or partial funding when:

- granting the request does not cause undue hardship on staffing levels; and
- the content is directly related to the employee's position; or
- the content is of direct benefit to the TVFHT.

If you wish to use Professional Development days or want to be considered for funding for an educational opportunity, you must submit the *Professional Development Request Form* ideally 15 working days in advance of the event.

The *Professional Development Request Form* is found online at:

<http://www.thamesvalleyfht.ca/intranet/staff/forms.aspx>

Approved professional development hours are considered part of your regular hours and must be entered in TimeTracker as professional development.

If you work more hours than your regular weekly schedule because of professional development time, you must rearrange your schedule that week so that total hours worked plus professional development time add up to your regular week, unless prior approval is granted by the appropriate Director under exceptional circumstances.

If TVFHT requires attendance at a professional development event, then the time spent at that event is treated as work time, as opposed to Professional Development. If the event takes place outside of normal hours or if attendance will lead to working more than your regular weekly schedule, then you will take equivalent time off during the week to ensure that your total work hours remain the same. See [Compensating Time](#) above.

*Note: You are responsible for paying for all approved professional development opportunities. You will be reimbursed following the submission of an expense report with original, itemized receipts. If this causes undue hardship for you, you may appeal directly to the Executive Director to request an advance on expenses. If an item (i.e., registration fee) is reimbursed before you attend the event, you must attend the event and provide proof of attendance. Failure to do so will mean that you owe TVFHT for any funds that were paid in advance of the event that you did not attend.*

## Mileage

Employees are reimbursed for eligible travel at a rate of \$0.40 per kilometer.

Mileage must be calculated so that you are not reimbursed for mileage that would normally be required to get from home to your designated location (see definition below) or from your designated location to home.



Travel between the designated location and an alternate location is eligible to be reimbursed, if your total driving for the day (home to designated location to alternate location back to designated location then home – or directly home from alternate location) is more than your normal mileage as described above.

### **Designated location - definitions**

**“Assigned clinical site”, i.e., the site where patient care is to be delivered that day, will be used to define the designation location for:**

- All IHPs (except those with a regional mandate listed below)

**“First TVFHT site travelled to that day” will be used to define the designated location for:**

- Administrative roles – Site Coordinators/Professional Practice Leaders

**“Central Office” (1385 North Routledge Park, London, ON) will be used to define the designated location for:**

- Central Office administrative roles
- IHPs with a regional mandate that are required by their position to move between two or more sites to provide therapy services (for example but not limited to, occupational therapy or respiratory therapy)

## Expenses

The following is a general overview of rules regarding expenses; please refer to the *General Travel and Expense Policy* (Appendix 2) for complete description of the rules. Please review the policy in detail prior to incurring expenses as you will only be reimbursed for expenses that fall within the rules.

You may be reimbursed for expenses incurred while travelling and performing job functions.

Expenses that may be considered for approval include:

- Transportation costs
- Accommodation
- Reasonable meal expenses of:
  - Up to \$10 for breakfast (including taxes and gratuities)
  - Up to \$15 for lunch (including taxes and gratuities)
  - Up to \$25 for dinner (including taxes and gratuities)
  - Alcoholic beverages are not reimbursable.
  - The maximum claim for 3 meals in a day is \$50. This is *not* a per diem amount; all original itemized receipts must be submitted along with your expense report.
  - Gratuities must be reasonable (maximum 15% of food costs before tax will be approved for reimbursement).
- Any other reasonable cost as approved by a Director or Executive Director

Original, itemized receipts and expense forms are always required before expenses are reimbursed. Receipts and expense reports submitted by fax will NOT be accepted. If you have underestimated an expense, TVFHT is not obligated to reimburse any overage between the original request and the actual receipts.

## Information Technology

Information technology is an essential tool in any efficient and effective workplace. TVFHT encourages maximum utilization of technology to support patient care, communications and business processes.

All automated equipment provided to you remains the property of TVFHT and/or the primary care practice and is to be used as required for business purposes. TVFHT recognizes that automated equipment may, from time to time, be used for non-business purposes. You are required to ensure that any non-business usage be conducted with respect for the employer and co-workers. Use of automated equipment shall be restricted to breaks and lunch periods.

You are reminded that TVFHT has the authority to inspect any communications conducted on TVFHT equipment and no records or activity should be considered confidential.

Misuse of automated equipment includes but is not restricted to:

- distribution of inappropriate material
- viewing of pornography or sexually suggestive materials
- internet purchases
- excessive time spent on internet searches or non-business related sites, social networking sites, chat rooms, etc.
- unauthorized or excessive telephone usage
- personal long-distance calls charged to the organization
- personal internet usage that uses excessive bandwidth (streaming or downloading music, movies, etc.)

If you use TVFHT smartphones and/or cell phones, you are responsible for any excessive non-business related charges.

If taking the device outside of Southern Ontario (i.e. while attending a Professional Development opportunity), check first with the Finance & Office Administrator to ensure that roaming charges will not apply.

TVFHT owned devices are not to be taken on vacation for the purpose of personal usage and should not be taken on vacation for work usage (except in circumstances approved by your Manager).

It is illegal in Ontario to operate a smartphone and/or cell phone while in a moving vehicle without the use of a hands-free communication device (source: <http://www.mto.gov.on.ca/english/safety/distracted-driving/index.shtml>). You are expected to comply with the laws.

If you are using equipment belonging to the TVFHT, it is your responsibility to properly maintain such equipment; follow the appropriate procedures for obtaining, using and returning it; and immediately report any loss or damage.

Replacement/repair costs not attributed to regular wear and tear will be charged to the employee responsible for the equipment, which ranges in value from \$20 to \$2000.

## Allocation of Portable Equipment

You will be eligible for portable equipment if the following criteria are met:

- There is mandate inherent in the position to move between three or more sites to provide therapy services (for example but not limited to, occupational therapy or respiratory therapy), **and**
- The nature of the IHP role requires the ability to be contacted with high frequency and timeliness (i.e., active, ongoing coordination of patient encounters with **multiple** team assistants and/or site coordinators).

Note: Situations where partial FTEs at multiple sites have been put together to create one position for a single employee do not qualify in this instance.

In these circumstances:

- You can request a laptop (to be allocated instead of rather than in addition to a desktop).
- You can request a corporate cell phone **or** request an approval to receive a monthly reimbursement of not more than \$25 to support the use of their personal device for TVFHT business.

### Notes:

- Reimbursement to be provided through the normal expense report process.
- Use of personal devices for TVFHT business will only be considered for roles that receive calls primarily from individuals internal to TVFHT. For roles that expect to receive any calls from patients or calls from a variety of (or multiple) external vendors, then using a personal device will not be an option.
- You will be required to complete a form when they receive portable equipment (laptop, laptop bag, phone, etc.). The form will contain information stating the approximate cost of these items, along with an acknowledgement that you will be responsible for replacement cost if you lose and/or damage the equipment.
- TVFHT allocated equipment is not to be substituted for personal equipment. Limited use of this equipment for non-business purposes is acceptable. If you regularly use such equipment for personal purposes, you are required to acquire your own personal device for this use.

## Allocation of Name Tags

Name tags will be provided to you on your first day of employment. Name tags can be replaced free of charge if they have been subjected to reasonable wear and tear.

If a name tag is lost or damaged in a way that is not normal wear and tear, you will be responsible for its replacement (cost approximately \$15.00).

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## Policies and Responsibilities

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### Confidentiality

Hold all information regarding patients, visitors and/or staff in strictest confidence, whether such information is received directly or indirectly. You will sign a confidentiality agreement as part of your employment agreement.

Any breach of confidentiality could result in loss of employment with the TVFHT.

Each TVFHT employee is responsible for seeking out and complying with any confidentiality policy in effect at the clinic/practice where you work.

### Recruitment and Selection

TVFHT is an equal opportunity employer. TVFHT is committed to recruitment practices that are fair and transparent for both internal and external candidates.

Responsibility for recruitment and selection of TVFHT employees rests with the appropriate Manager. Selection will be based on a competitive process that includes screening, interviewing, testing (if appropriate) and checking employer references, criminal background check and credentials. All competition records will be maintained in Human Resources in accordance with Human Resources procedures for record retention and confidentiality.

It is the responsibility of the Manager to ensure the objectivity of any competition panel of interviewers. Where a candidate has a pre-existing relationship to a member of the panel, that member must be removed from any interview selection process affecting the outcome of the competition.

Prior to their start date, and on an ongoing basis, successful candidates are required to provide evidence of good standing in the appropriate regulatory body for their profession, along with proof of liability coverage as required.

### Probation

Each new employee is subject to a probation period of 90-120 days. During probation, the new employee is expected to learn and ask questions to clarify:

- The organization's policies and procedures; and
- Required job functions and responsibilities.

Each new employee will receive a probationary performance review after 90 days (but no later than 120 days) of employment with TVFHT. Failure to meet expected performance levels at the end of the probationary period may result in dismissal. Such dismissal does not require written notice and is not subject to severance payments.

TVFHT reserves the right to extend the probationary period if performance levels are not as expected at the end of the initial probationary period. The probationary period may not be extended for more than an additional 90 days. Any extension shall be in writing. If performance levels are not as expected at the end of the initial probationary period, the extension letter shall also include the performance expectations that must be met for the probation extension to be considered successful.

Employees who work less than 0.5 FTE at any given location will have a probationary period of 120-150 days, and the employee will receive a probationary performance review after 120 days (but no later than 150 days) of employment. This longer probationary period allows for those employees with less than 0.5 FTE at a site to have ample opportunity to interact with colleagues and develop a solid understanding of the position.

## Professional Standing/ Liability Coverage

If applicable, you are required to submit confirmation of registration with the appropriate professional college or association every year. All inter-disciplinary health professionals (not administrative staff) must also submit confirmation of liability coverage. These must be submitted before starting employment **and** annually thereafter. Proof of each will be kept in your employee file at Central Office.

Note that any employee with expired registration or insurance will be immediately placed on unpaid leave until the proof of registration/insurance is provided, and may (at TVFHT's discretion) be terminated with cause depending on the circumstances.

## Personnel Records

It is important that your personnel record contain accurate information. It is your responsibility to notify TVFHT promptly if there is any change in your family status, name, telephone number, address, bank information or educational achievements. Please fill out the *Employee Personal Information Change Form* <http://www.thamesvalleyfht.ca/intranet/staff/page17001753.aspx> available on the TVFHT website in the Members Only section and submit to the Human Resources Administrator.

You have a right to review your employee file. Requests to do so should be forwarded in writing to the Director of Clinical Operations and HR or the Executive Director. Access will be given within ten (10) business days of receipt of the request. Your employee file may only be reviewed at Central Office as your file may not be duplicated or removed from Central Office premises.

## Conflict of Interest

### Definition:

A conflict of interest occurs in any situation where an employee has a direct or indirect competing interest with the activities of the TVFHT. This competing interest may result in the individual being in a position to benefit from the situation, or in the TVFHT not being able to achieve a result in the best interests of the TVFHT.

Conflict of interest includes, but is not limited to situations:

- Where an employee's private affairs or financial interests are in conflict with their job related duties, responsibilities and obligations, or could reasonably be expected to result in a public perception that conflict exists;
- That could reasonably be expected to impair the employee's ability to act in the public interest; and;
- Where the actions of an employee could reasonably be expected to compromise or undermine the trust in public places in the TVFHT.

Ensure that you are free of conflict of interest, either real or perceived. You must report any potential conflict of interest to your Manager so that appropriate action can be taken to protect you and/or TVFHT.

An unreported or unresolved conflict of interest could result in loss of employment with TVFHT.

## Performance Management

Performance reviews provide management with a formal opportunity to communicate feedback regarding performance and corporate expectations. Performance reviews also provide you with a formal opportunity to discuss your successes through the year, and to communicate your desires around future career goals and objectives.

TVFHT's philosophy of collaborative care and the emphasis that TVFHT has on team work supports using a multiple input rating process as a comprehensive method of assessing your performance and ongoing professional development needs.

For a full explanation of the Performance Review and Development process, please see [Appendix 3](#).

TVFHT reserves the right to initiate performance management steps outside of the normal Performance Review and Development process. Most likely, this would occur in conjunction with a disciplinary event (see *Discipline* below).

## Dispute Resolution

Any day-to-day problems or issues should be resolved at your location in collaboration with your Manager (if your Manager's assistance is necessary). If a dispute still cannot be resolved, the appropriate Director may be required to assist in resolving the dispute. See the *Dispute Resolution Procedure* ([Appendix 4](#)) for more information

## Discipline

TVFHT reserves the right to discipline or discharge employees in certain circumstances.

TVFHT adheres to the principles of progressive discipline. See the *Progressive Discipline Procedure* (Appendix 5) for more information. This procedure will be followed in all applicable situations.

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## Leaves and Other Absences

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### Pregnancy/ Parental Leave

TVFHT is committed to assisting you and your family during the very exciting time of welcoming a new child into your family. TVFHT follows all legislated requirements related to parental and adoption leave according to the provisions of the *Employment Standards Act*.

If you have been working at TVFHT for 13 weeks before the child is born or in your custody, you are entitled to:

- Pregnancy leave of 17 weeks unpaid as well as parental leave of 35 weeks following  
or
- Parental leave of 37 weeks unpaid.

For more information on pregnancy/parental leave, please see [Appendix 6](#).

## Compassionate / Bereavement Leave

Compassionate leave will be granted for the purpose of mourning the death of a member of your family. For this purpose, family consists of:

- the employee's spouse<sup>5</sup>;
- the employee's father and mother and the spouse of the father or mother;
- the employee's child(ren) and the child(ren) of the employee's spouse;
- the employee's grandchild(ren); the employee's brothers and sisters;
- the grandfather and grandmother of the employee;
- the father and mother of the spouse of the employee and the spouse of the father or mother;
- and any relative of the employee who resides permanently with the employee or with whom the employee permanently resides.

You may request leave of TVFHT up to a maximum of three (3) days between the date of death and including the day of the funeral.

In the case of the death of a friend or relative not defined above, a leave may be granted by your Manager in accordance with guidelines for Personal Emergency Days (see page 15).

Additional unpaid days may be granted upon request. The *Leave of Absence form* is found on the TVFHT website in the Members Only section <http://www.thamesvalleyfht.ca/intranet/default.aspx>. This form needs to be completed and sent to your Manager for signature, then forwarded to the Human Resources Administrator.

## Jury and Witness Duty

If you are required to report for jury duty or are subpoenaed as a witness in a Crown proceeding on days you are scheduled to work, you will receive pay and accrue benefits and service/seniority to which you are normally entitled.

You must provide proof of such duty to your Manager. Any compensation paid by the court that applies to wages/expenses must be reimbursed to TVFHT.

## Voting on Election Day

TVFHT encourages you to participate in the electoral process, including all municipal, provincial and federal elections.

To ensure that you have adequate time to exercise your franchise to vote, TVFHT will not prevent you from having three (3) consecutive hours free to vote during the hours the polls are open. TVFHT reserves the right to approve and schedule this leave and will endeavor to minimize the time away from work.

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<sup>5</sup> In the Ontario Family Law Act, "spouse" is defined as a person who is married or thinks they are married as well as: either of two persons who are not married to each other and have  
cohabited, (a) continuously for a period of not less than three years, or  
(b) in a relationship of some permanence, if they are the natural or adoptive parents of a child

## Family Medical Leave

You may take an unpaid leave of up to eight (8) weeks in a 26 week period to provide care or support for a family member or other person who considers you to be like a family member when a qualified medical practitioner has issued a certificate indicating that the family member or other person has a serious medical condition with a significant risk of death occurring within a period of 26 weeks.

You may be eligible for Employment Insurance benefits during this unpaid leave.  
All rights and benefits will continue while on Family Medical Leave.

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## Occupational Health and Safety

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### Occupational Health and Safety

It is your legal responsibility as an employee of the TVFHT to report any workplace hazards and incidents, to work in a safe manner, and to use appropriate precautionary measures or devices as provided by the TVFHT. You are responsible for reading and complying with all Occupational Health and Safety (OH&S) Procedures as outlined in the Occupational Health and Safety Binder (OH&SB) which is located at each site. Note that these are also available in the Members Only section of the TVFHT website <http://www.thamesvalleyfht.ca/intranet/page1625811.aspx> such that they can be referred to at any time.

New procedures will be communicated to you by email, and then added to the OH&SB. You are responsible for being aware of and following all OH&S procedures.

TVFHT has a Joint Health and Safety Committee that meets regularly (quarterly at minimum) to address OH&S issues. The committee includes a minimum of two management members appointed by administration and two employee members elected by staff. Names of committee members are posted on the health & safety bulletin board at each TVFHT site. Minutes from these meetings will be forwarded to site Health and Safety Representatives to share with their team and be filed in the OH&SB.

Each site has an elected health and safety representative. The name of the site representative is posted on your health and safety board. If you have any health and safety concerns, please discuss with the Health and Safety Representative at your site. You are encouraged to learn more about your rights and responsibilities under the *Occupational Health and Safety Act*.

### First Aid Representatives

Each site has a TVFHT employee first aid representative. This person must hold a current Standard First Aid CPR certificate and will be familiar with the location of the site first aid box, its' contents and the TVFHT Health and Safety First Aid procedure. The name of the first aid representative is posted on or near the health and safety board.

### Incidents

When an incident occurs, you are to refer to the procedures outlined in the OH&SB. To date, procedures have been developed to address: *Sharps Incidents, Slips, Trips and Falls, and Hazardous Material Handling*.

## Healthy Workplace

You are to refer to and comply with the following procedures and information outlined in the OH&SB which currently include: *Workplace Violence Prevention, Harassment and Discrimination, Sharps Injury Prevention, Influenza Vaccine, Hand Washing, Infectious Disease, Personal Protective Equipment, Ergonomics, WHMIS, and Scent Free Workplace.*

## Personal Safety

Where possible, you are not to be alone at a TVFHT location when seeing patients.

All attempts, including rescheduling of other TVFHT employees, will be made to avoid this situation. If such situations are unavoidable, then employees must follow the *Working Alone and Home Visit Safety procedures* found in the OH&SB. Home visits may be a part of the primary care work environment, and you must ensure that you follow the *Home Visit Safety procedures* when providing this care.

## Ergonomics

All TVFHT employees receive an ergonomic checklist at their orientation and will receive an assessment within 30 days of starting work at their site(s) by their Site Coordinator. If you do not have this information or have misplaced it, please contact the Site Coordinator for your site.

If you have made all of the suggested adjustments based on the information provided and are still having issues with your workstation, please discuss this with the Site Coordinator for your site. Central Office commits to completing an ergonomic assessment within one month of being notified, or sooner if the ergonomic concerns have significant urgency/severity.

## Scent Free Workplace

Medical evidence clearly shows that scented products are harmful to the health of sensitive individuals. Due to health concerns arising from exposure to scented products, TVFHT acknowledges its responsibility to provide a healthy environment for its employees, service providers, patients and guests.

The use of scented products will not be permitted within our facilities at any time. In order to be a scent free workplace, use of the following items must be avoided:

- Perfume
- Cologne
- Air fresheners
- Candles
- Pot-pourri
- Scented lotions
- Highly scented flowers
- Highly scented hair products

This list is not exhaustive and may be changed accordingly.

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<sup>6</sup> Please note that at the time of writing, Central Office had sourced a scent free odor elimination product that your Team Assistant can acquire.

<b>Title:</b>	<b>Occupational Health &amp; Safety – Inclement Weather Procedure</b>	
<b>Approved By:</b>	Keri Selkirk, Executive Director	<b>Pages:</b> 1 of 1
<b>Date Implemented:</b>	December 2010	
<b>Revised:</b>	December 2014	

### **Preamble**

It is the goal of the Thames Valley Family Health Team (TVFHT) to take reasonable precautions to ensure the safety of our employees as they travel to work, between sites, and home from work during inclement weather.

### **Responsibilities**

#### Central Office

- Executive Director (ED), or designate will decide when TVFHT sites need to be closed due to inclement weather
- The ED will review road conditions as reported by the Ministry of Transportation (MOT), city officials, and police departments when making the decision to call a “weather closure” closure
- Central office will post site closure recommendations on the TVFHT website
- Central office will maintain an emergency contact list to notify sites, when the ED has called a “weather closure” closure
- Central office will ensure all employees are paid when the ED recommends a “weather closure” closure

#### Site Coordinator

- Report to ED or designate if they think a “weather closure” should be considered in their area

#### Team Assistant

- Report to Site Coordinator if closure should be considered in their area
- Inform employees of “weather closure” closure, as recommended by Central Office
- Report employee absence due to inclement weather to Central Office
- Will maintain an emergency contact list for their site

#### Employees

- Are encouraged to comply with “weather closure” recommendations as announced by Central Office
- When employees feel it is unsafe to travel to and from work due to inclement weather, they are expected to notify their Site Coordinator
- Without an official “weather closure” announcement, employees are expected to use personal emergency time, comp time, vacation or take an unpaid leave should they feel it is not safe to travel to and from work due to inclement weather

**\*\* If the clinic is closed as a result of inclement weather, then the family health team staff should also consider their site closed.\*\***

 Thames Valley Family Health Team	<b>Policy Title</b>	<b>Code Number</b>
	General and Travel Expenses Policy	<b>Page</b> 1 of 1
	<b>Approval Date:</b> February 27, 2014	<b>Last Review Date:</b> February 27, 2014
	<b>Approval Body:</b> Board of Directors	<b>Last Revision Date:</b> February 27, 2014

## Purpose Statement

This policy defines the responsibilities and processes for general and travel expense authorization, reimbursement, and where applicable, disposal and/or sale.

The TVFHT manages general and travel expenses in a manner that is modest and appropriate and strikes a balance among economy, health and safety, and efficiency of operations. The TVFHT only pays or reimburse expenses in compliance with this policy.

## Part 1: General Expenses

### 1.1 Acquisition of Goods & Services:

The TVFHT is responsible only for the contracting of needed goods and services for TVFHT. A contract signed by a person other than the Board Chair and/or the Executive Director is invalid and voidable. No employees or affiliated physicians have authority to represent or bind the TVFHT to a contract, purchase order or agreement, promise to pay, sale or trade-in, custodial obligation or equipment evaluation, contractual change or relief, lease or rental agreement, or purchase order modification, addition or deletion. Any such improper obligation, even if initially honoured by TVFHT, is voidable at the discretion of TVFHT.

Other than where a contract for goods or services, or a vendor of record has been established, all employees and/or agents of the TVFHT will seek authorization prior to entering into any transaction, contract, or obligation for goods or services that binds the TVFHT.

Goods and services include:

- office supplies
- leases or purchase of office equipment: faxes, telephones, computer equipment
- leases for space occupied by the TVFHT
- service contracts for office cleaning, maintenance, HVAC, etc.
- contracts for medical supplies and equipment
- insurance
- utilities
- consultants
- TVFHT staff benefits and related employment costs

### 1.2 Disposal or Sale of Goods:

The disposal or sale of goods, such as furniture, equipment, etc., requires prior written authorization from the Executive Director.

### 1.3 Overview and Purchasing Principles:

The TVFHT ensures best value for money by ensuring all qualified suppliers have reasonable opportunity to bid on agency business in a fair, transparent, and competitive process. This is achieved through use of informal, formal, and sealed bids based on the value of the purchase made. Solicitation of competitive bids is in accordance with the limits outlined in the charts below.

Staff responsible for operational purchasing are accountable to:

- consult with users to establish requirements and performance expectations
- review the Expense Category chart for the appropriate process to seek price quotes
- review the Expense Category chart for the appropriate authorization signature
- act as the TVFHT liaison with the supplier (if requested to do so by central office)
- evaluate vendor performance and provide feedback to the supplier and TVFHT contact

There is a declaration of a conflict of interest in any case where an employee is a supplier or has a relationship with a supplier.

### 1.4 Price confirmation, pre-authorization, and invoice approval

Requirements to obtain prices prior to placing an order differ by category (see charts below and on the following page.)

- After obtaining prices, the staff member consults with the central office purchasing contact.
- The Executive Director authorizes all expenditures by way of a signature on the quote or contract. Electronic documentation of approval via e-mail is acceptable if no formal purchase order or contract is required. Completion of documentation is necessary prior to ordering the product from the supplier.
- After receipt of the product and confirmation that the invoice price aligns with the order quote, the Executive Director approves the payment by way of a signature on the invoice. Invoice confirmation, authorization, and forwarding to the accounts payable department will be completed in a timely fashion, ensuring the usage of early payment discounts.
- Employees in receipt of corporate credit cards observe the same pre- and post- authorization processes.

<b>Expense Category: Disposable Office Supplies (e.g., pens, pencils. Includes fax and printer toner)</b>					
Obtaining Pricing/Ordering			Pre-Authorization		Invoice Approval
	Not Required	Phone/Online Quotes	Responsible Staff	Central Office Contact/Executive Director	Executive Director
\$0-\$250	X		X		X
\$250 & above	X			X	X

<b>Expense Category: One-Time Office Supplies (e.g., shredders, whiteboards)</b>					
Obtaining Pricing/Ordering			Pre-Authorization		Invoice Approval
	Not Required	Phone/Online Quotes	Responsible Staff	Central Office Contact/Executive Director	Executive Director
All		X		X	X

<b>Expense Category: Contracts for Office Cleaning, Equipment/HVAC Service &amp; Maintenance, Utilities</b>					
Obtaining Pricing/Ordering			Pre-Authorization		Invoice Approval
One-time Individual Purchase or Annual Contract	Not Required	Written Quotes	Responsible Staff	Central Office Contact/Executive Director	Executive Director
All		X		X	X

Expense Category: Lease/Purchase of Space, Insurance, Office Equipment (phone, fax, copiers, computers)					
Obtaining Pricing/Ordering			Pre-Authorization		Invoice Approval
One-time Individual Purchase or Annual Contract	Not Required	Written Quotes	Responsible Staff	Central Office Contact/Executive Director	Executive Director
All		X		X	X

Expense Category: Memberships, Dues, Fees (Organizational*)					
Obtaining Pricing/Ordering			Pre-Authorization		Invoice Approval
One-time Individual Purchase or Annual Contract	Not Required	Written Quotes	Responsible Staff	Central Office Contact/Executive Director	Executive Director
All		X		X	X

(\*Individual Professional Fees or dues are not eligible for reimbursement)

### 1.5 Consultants

Where available, the TVFHT observes Ministry direction for contracting with consultants. At a minimum the following applies:

- Consultant services valued at >\$100,000 requires an open competition:
  - consultants are not entitled to bill for hospitality, meals, or incidental expenses
  - consultants are entitled to bill for travel and accommodation, if pre-approved and within the policy sections 2.1, 2.3 and 2.5 stated below.

Expense Category: Consultants									
One-time Individual Purchase or Annual Contract	Obtaining Pricing					Pre-Authorization/Invoice Approval			
	Not Required	Phone Quotes	Written Quote	Written Quote (min. 3 vendors)	Advertised Tender/ RFP	Responsible Staff	Central Office Staff	Executive Director	Board of Directors (or delegated to Board Chair)
\$0-\$10,000			X					X	
\$10,001-\$30,000				X				X	
\$30,001 & above					X				X

### 1.6 Other General Expenses

Catering and meeting refreshments

- Regular staff, networking and quarterly meetings: see meeting protocols (Attachment 1) for more information.
- For meetings involving staff from other TVFHT sites and/or guests from other organizations held over the lunch hour, follow meeting protocol for quarterly meetings. For meetings held at other times during the day, water, coffee, and/or tea can be provided.
- Expenses related to liquor are not paid or reimbursed.

Exception: Hospitality and VIPs

- The Executive Director and/or the Board Chair may authorize expensing modest catering and alcoholic beverages for special events.

Bonuses, gifts, and honoraria

- Providing modest gifts to recognize guest speakers is permissible but requires Executive Director approval.

## 1.7 Exceptions

Single source vendors

- Standard procurement process may be waived under some circumstances:
  - an emergency
  - urgent, confidential, or high security to protect life or health
  - where only one vendor exists
  - where compatibility with existing resources is required and cost effective
  - statutory monopoly
- All exceptions require the authorization and signature of the Executive Director.

Vendor of Record

- Where there is establishment of a vendor of record or contract, waiving the procurement process is permissible.
- Pre-approval of the expenditure must still be obtained following the process on the appropriate Expense Category charts (see above.)

## 1.8 Perquisites

The Broader Public Sector (BPS) Perquisite Directive sets out requirements for the TVFHT to establish rules on perquisites ('perks') where these are provided through public funds.

A perk is defined under the BPS Directive as '*a privilege that is provided to an individual or to a group of individuals, provides a personal benefit, and is not generally available to others*'. A perquisite is not allowable if it is not a business-related requirement.

To be allowable, a perquisite must be a business-related requirement for the effective performance of an individual's job and MUST be approved by the Board Chair in writing. A perquisite must only be allowable in limited and exceptional circumstances where it is demonstrated to be a business-related requirement. Examples of perks that are not permitted under any circumstance include club memberships, season's tickets to cultural or sporting events, access to private health clinics (medical services outside those provided by the provincial health care system or the TVFHT's group insured benefit plan), and professional advisory services for personal matters, such as tax planning. The BPS Perquisite Directive requires the TVFHT to make summary information regarding allowable perquisites publicly available. This information will be posted on an annual basis on the TVFHT's website.

## Part 2: Travel

Travel & conference expenses must be work-related.

### 2.1 Pre-approval

- All professional development travel and conference expenses require prior authorization from the appropriate Manager before any expense is incurred.
- All TVFHT-required travel and conference expenses will be determined prior to the event in consultation with the appropriate Manager.
- Employees will receive pre-approval for a fixed dollar amount to cover expenses related to TVFHT required travel and conferences. Use of this fixed dollar amount is subject to the requirements set out in Part 2 (Travel) of this policy. This fixed dollar amount may or may not equal the amount of funding requested by the employee in advance.
- All travel is to be the coach/economy class. Any exception requires prior authorization by the Executive Director.
- All air travel requires prior authorization by the Executive Director.
- All international travel requires prior authorization by the Executive Director.
- All expense claims require original itemized receipts.
- All claim submissions are authorized by the Executive Director.
- For more information, see the TVFHT Employment Handbook.

## 2.2 Transportation

### By car

- Carpooling is encouraged wherever possible and mandatory wherever two (2) or more staff from the same home office site travel to the same destination. Employees are encouraged to make reasonable efforts to rendezvous with any staff travelling to the same location along the same route.
- Reimbursement for employees using their own vehicles is on a per kilometer basis (see the TVFHT Employment Handbook for more information.) The calculation of mileage is from either the employee's home office site or residence, whichever is less. The mileage rate is inclusive of all costs such as gas, insurance, maintenance, etc.
  - Insurance of personal vehicles used in the course of TVFHT business is at the vehicle owner's expense for personal motor vehicle liability. Coverage is equal to or greater than the minimum liability specified in the *Compulsory Automobile Insurance Act R.S.O. 1990*. Drivers are responsible to determine if their insurance coverage includes business use of their vehicles. The TVFHT will not reimburse costs of business use coverage or collision and liability coverage beyond the calculation included in the reimbursement rate per kilometer.
  - The TVFHT assumes no financial responsibility for privately owned vehicles other than paying the kilometric rate when used for TVFHT business. The TVFHT is not responsible for reimbursing deductible amounts related to insurance coverage. Those driving a personal vehicle on TVFHT business cannot make claims to the TVFHT for damages because of a collision.
  - When the employee has reasonable access to a rental company, they will consider car rentals for travel where the cost is equal to or less than the kilometer rate. The size of the rental car is the most economical and practical required for the business task and the number of occupants. The TVFHT will not reimburse employees for the rental of luxury and sports cars.
    - Re-fuel vehicles before returning them to avoid extra charges.
    - Purchase damage/collision waiver coverage from the rental car company and expense the cost of the coverage.
    - Employees will report accidents immediately to local law enforcement authorities, the rental car agency (if applicable), the automobile insurance company (if using a personal vehicle), and the employee's immediate supervisor.

### By rail:

- The TVFHT covers rail-coach/economy class when it is the most practical and economical way to travel. Travel in any class other than coach/economy will require prior authorization by the Executive Director.

### By air:

- The TVFHT covers air-economy class when it is the most practical and economical way to travel. Make travel arrangements in advance and book by fixed dates. Open-ended tickets are not permissible. Prior authorization from the Executive Director is required for all air travel.

### Other land travel:

- The TVFHT covers the cost of public transportation when required including taxi, shuttles, or mass transit.
- Employees obtain prior approval from the appropriate TVFHT Manager for reimbursement of taxicabs between home and the employee's assigned home office site if justified by exceptional circumstances, for example:
  - when other means of transportation are not available
  - when weather conditions so warrant
  - when health or safety warrants
  - when the transport of work-related baggage or parcels is required
- Where group travel by taxicab is more economical than the total cost of individuals traveling separately, employees can claim the taxicab expense. Receipts are required.
- Loyalty Programs: Travelers can participate in loyalty programs, such as frequent flyer, so long as they select the most cost-effective mode of travel.

## 2.3 Accommodation

- Staff are encouraged to consider travel when scheduling meetings to avoid unnecessary cost. The TVFHT covers work-related accommodation costs including:
  - morning meetings and/or appointments that require the employee to leave their homes earlier than 6:00 am in order to attend the appointment or meeting.
  - afternoon meetings extending beyond 6:30 pm where staff is travelling more than two hours to their home.
  - exceptions where weather or other safety issues exist.
  - exceptional or emergency situations that require personnel to be close to their assigned home office for periods long in excess of normal working hours.
- When authorized, reimbursement is for single accommodation in a standard room. Reimbursement will not apply to suites, executive floors, or concierge levels.

## 2.4 Meals

- The TVFHT covers work-related meal expenses, excluding when the employee is on business at another TVFHT site office:
  - a normal meal period when the employee is away on TVFHT business
  - when an employee is required to work three or more hours after the usual hours of work and consumes the meal within the time worked
- The meal expense is subject to approval by the Executive Director upon presentation of original itemized receipts.
- Reimbursement of meal expenses will not include reimbursement of any alcoholic beverages.
- Reasonable meal expenses, **including** taxes and gratuities are defined as
  - Breakfast \$10.00
  - Lunch \$15.00
  - Dinner \$25.00

(NOTE: as mentioned above, original itemized receipts per meal are required in order to be reimbursed for meal expenses)

With prior approval from the Executive Director, the TVFHT reimburses meals when hosting external guest(s) for a business lunch that advances the business of the TVFHT.

For additional information, see the TVFHT Employment Handbook.

## 2.5 Other Travel Expenses

- The TVFHT reimburses the costs of:
  - Bridge, ferry, and highway tolls and necessary parking fees paid while driving on TVFHT business. Obtain receipts and submit wherever possible.
  - Reasonable gratuities for meals and bellhop, etc. Receipts are not necessary to support reimbursement of these expenses.
  - Laundry/dry cleaning service for employees away from home for five or more consecutive days. Receipts are required.
  - Calls home for each night away. The employee uses the most cost-effective method to minimize costs.
  - Business calls, air/rail phones where TVFHT provided equipment/service is unavailable.
  - Computer access charges, photocopying, word processing services, facsimile transmissions.
  - Internet connections; employees use the least expensive means of obtaining internet access while travelling.
  - Rental and transportation of necessary office equipment provided the charges be incurred while conducting TVFHT business.
- The TVFHT will not reimburse the costs of:
  - Dependent care expenses.
  - Recreation, such as video rentals, mini-bars, etc.
  - Personal items.
  - Traffic and parking violations.
  - Social events.
  - Alcoholic beverages.
  - Any costs for friends or family members.
  - Professional fees or dues

## Thames Valley Family Health Team Meeting Guidelines

Meeting Type	Frequency / length of meeting	Who to invite	Purpose	Responsible person	Responsibilities	Budget
<b>Regular TVFHT Staff Meeting</b>	<ul style="list-style-type: none"> <li>✓ As needed and/or determined by each site</li> <li>✓ 60 minutes</li> <li>✓ Allow time for a 30 minute unpaid lunch break</li> </ul>	<ul style="list-style-type: none"> <li>✓ TVFHT Site Staff</li> <li>✓ Site Coordinator</li> </ul>	<ul style="list-style-type: none"> <li>✓ Site updates</li> <li>✓ program updates</li> <li>✓ general information sharing within the team</li> </ul>	Site Coordinator or Team Assistant	<p><u>Site Coordinator:</u></p> <ul style="list-style-type: none"> <li>✓ Call for agenda items</li> <li>✓ Chair meeting</li> </ul> <p><u>Team Assistant:</u></p> <ul style="list-style-type: none"> <li>✓ Prepare and distribute agenda at least two days prior to meeting</li> <li>✓ Arrange for refreshments if they are being provided.</li> <li>✓ Scribe, prepare and distribute minutes to all members of the team, regardless of whether they were in attendance</li> </ul>	<p>\$5.00 per person</p> <p><i>(Inclusive of all taxes, gratuities and delivery fees)</i></p>
<b>Networking Group Meeting</b>	<ul style="list-style-type: none"> <li>✓ 4-6 times/year as determined by each discipline group</li> <li>✓ TVFHT allots 2-4 hrs for these meetings but can be longer if a PD piece is included (i.e. community partner presentations)</li> <li>✓ Allow time for a 30 minute unpaid lunch break</li> </ul>	<ul style="list-style-type: none"> <li>✓ All staff within each discipline</li> <li>✓ Professional Practice Leader</li> <li>✓ Director of Clinical Operations &amp; HR</li> <li>✓ Director of Quality &amp; Integration</li> </ul>	<p>As determined by each group. Can include:</p> <ul style="list-style-type: none"> <li>✓ Program sharing</li> <li>✓ Site updates</li> <li>✓ Case studies</li> <li>✓ Updates on PD attended</li> <li>✓ External speaker / community resources</li> <li>✓ General information sharing</li> </ul>	<ul style="list-style-type: none"> <li>✓ As determined by each group.</li> <li>✓ It is a good idea to buddy up so that one person can chair and the other can take minutes</li> </ul>	<p><u>Meeting Chair:</u></p> <ul style="list-style-type: none"> <li>✓ Submit Central Office Meeting Request form (TVFHT website)</li> <li>✓ Call for agenda items</li> <li>✓ Organize guest speaker if requested by group</li> <li>✓ Chair the meeting</li> <li>✓ Take minutes (or assign person to)</li> <li>✓ Assign a Time Keeper</li> </ul> <p><u>Coordinate with Admin.</u></p> <p><u>Assistant:</u></p> <ul style="list-style-type: none"> <li>✓ Details of Meeting Request form</li> <li>✓ Food order</li> <li>✓ Transcribe &amp; distribute agenda &amp; minutes (if required)</li> </ul>	<p>\$10.00 per person</p> <p><i>(Inclusive of all taxes, gratuities and delivery fees)</i></p>
<b>Site Quarterly All Staff Meeting</b>	<ul style="list-style-type: none"> <li>✓ Quarterly</li> <li>✓ 90 minutes</li> <li>✓ 2 formal meetings per year</li> <li>✓ 2 informal meetings per year</li> <li>✓ Allow for a 30 minute unpaid lunch break</li> </ul>	<ul style="list-style-type: none"> <li>✓ All TVFHT staff</li> <li>✓ Site Coordinator</li> <li>✓ All Clinic Staff</li> <li>✓ All Clinic Physicians</li> <li>✓ Executive Director</li> <li>✓ Director of Clinical Operations &amp; HR</li> <li>✓ Director of Quality and Integration</li> <li>✓ Medical Director**</li> <li>✓ Executive Assistant / Communications Coordinator</li> </ul>	<ul style="list-style-type: none"> <li>✓ Clinic/Physician updates</li> <li>✓ TVFHT Corporate update</li> <li>✓ IHP reports re: programs etc...</li> <li>✓ Can include External speaker / community resources</li> <li>✓ A forum for any clinic staff, physician or TVFHT staff to ask questions or have any concerns addressed</li> </ul>	Site Coordinator or Team Assistant	<p><u>Site Coordinator:</u></p> <ul style="list-style-type: none"> <li>✓ Call for agenda items</li> <li>✓ Chair the meeting</li> </ul> <p><u>Team Assistant:</u></p> <ul style="list-style-type: none"> <li>✓ Book the location</li> <li>✓ Arrange for refreshments/food order</li> <li>✓ Prepare and distribute agenda</li> <li>✓ Arrange for any AV equipment</li> <li>✓ Scribe, prepare and distribute minutes to all members of the TVFHT team, all physicians and their clinic staff, regardless of whether they were in attendance (copy to Central Office for review and filing)</li> </ul>	<p>\$10.00 per person</p> <p><i>(Inclusive of all taxes, gratuities and delivery fees)</i></p>

\*\*send invitation through Executive Assistant please



## Performance Review and Development Procedure

### **Purpose:**

Performance development is an ongoing process. The purpose of the performance review is:

- to provide management with a formal opportunity to communicate feedback regarding performance and corporate expectations
- to provide you a formal opportunity to discuss your successes through the evaluation period, and communicate your desires around future career goals and objectives

### **Benefits of Performance Development:**

- You are an active participant in the evaluation process
- Your strengths and areas of improvement are identified
- Ongoing goals and objectives are agreed upon
- Gives management a tool to use when considering professional development needs, fit for new employment opportunities, or need for remedial action

### **Timeframe of Performance Development:**

- Informal feedback will be sought and provided on an ongoing basis
- Formal reviews will be conducted at a minimum of every two years. Many reasons would precipitate a review happening more often. Examples of these are: a change in your position such that an annual review would assist in development in a new role and regular check-ins to ensure progress in your development plan, full-time employees may have Performance Reviews more regularly than those who work part-time.

### **Components of The Thames Valley Family Health Team (TVFHT) Performance Review and Development Plan Are:**

1. Self Evaluation Survey
2. Performance Development Survey
3. Multiple Reviewer Summary Form
4. Performance Development Plan

#### **1. Self Evaluation**

Central Office will provide to you with:

- **Self Evaluation Survey**
- **Discipline Role Description**

You will receive these documents 4-6 weeks in advance of your performance review date. You should complete the online **Self Evaluation Survey** which will be provided to you.

## 2. Performance Review Survey

The philosophy of collaborative care and the emphasis that TVFHT has on team work supports using multiple input rating sources as a comprehensive method of assessing performance and ongoing professional development needs. This process gives those who work closest with you an opportunity to provide feedback on your performance.

The TVFHT **Performance Review Input Survey** will be sent out for completion by individuals identified by you and management team as having a sound knowledge of your role, and those who interact frequently on a professional basis. You will be asked to provide six names of individuals that you work closely with and who would best be able to provide an accurate report of your performance as it relates to the clinic and patient needs. The list of names should include:

- Min. 2 – Max. 3 Family Health Team staff from the site you work at
- Min. 2 – Max. 3 physicians from the site you work at
- 1 or 2 Family Health Team staff from a site that you do not work at, from same discipline
- 0 or 1 clinic/physician employee (if appropriate)

From this list of six names provided by you, at least four respondents will be chosen. The management team will choose an additional two names.

Central Office will provide to the chosen reviewers:

- **Performance Review Input Survey**
- **Discipline Role Description**

## 3. Performance Development Summary Form

The completed performance forms will be submitted to Central Office within two weeks of receipt, as clearly outlined in the correspondence. Once received at Central Office the information will be collated into a **Multiple Reviewer Summary Survey**.

At the formal employee review meeting only the summary Multiple Reviewer Summary document will be available. You will have the opportunity to decide if the Multiple Reviewer Summary document will become part of the permanent HR file.

## 4. Performance Review and Development Plan Meeting

The Performance Review and Development Plan meeting will take place between you and your Manager. The final evaluation will take into consideration all of the components described above. The Performance Review and Development Plan will be completed in draft before the meeting. Additional comments to be added during the meeting will be comprised of:

- The Professional Development you have participated in
- Areas of recognition
- Areas for development
- Career goals and objectives

You will receive the completed Performance Review and Development Plan for signature, no later than two weeks after your performance review meeting. The Performance Development Plan will be reviewed by your Manager(s) and the Executive Director and becomes part of the permanent HR file.

# Questions and Answers Regarding the Performance Review and Development Procedure

## **Why has TVFHT chosen a multiple reviewer evaluation process?**

With the focus on teamwork and inter-professional collaboration, a multiple reviewer evaluation approach uses multiple rating sources to provide more accurate, reliable and consistent information. This method is used in many health care settings and those of you who have worked in hospital settings may have already had experience with this process.

## **What is the timeframe for this process?**

It will take approximately six weeks from the time you are notified of the process to the time that you meet for your Performance and Development Plan.

## **How should I decide what names to provide to complete the Performance Review Input Survey?**

You should choose people whom you work closest with and who would be best able to provide the most unbiased accurate assessment of your role performance. Although many of you may not work directly with another professional from your discipline, you should choose someone whom you have worked on a program or committee with. The management team has the responsibility for deciding who from your list will receive the Performance Review Input Form and anyone chosen can refuse to respond if they feel that they cannot provide the necessary input.

## **Will I have an opportunity to see individual comments and ratings during my Performance Review and Development Plan Meeting?**

No. The finalized list of reviewers and attribution of specific ratings and comments will not be disclosed to encourage candid feedback. Scores and general comments will be reviewed during the meeting and you will have the opportunity to decide whether you wish to have the Multiple Reviewer Summary document filed in your Employee HR File or not.

## **How should I prepare for the Performance Review and Development Plan Meeting?**

The best way to prepare for this meeting is to spend time reflecting and completing your Self Evaluation Form. The Self Evaluation Form is not only a comparative tool but it also serves as a critical source for ongoing communication in order to review past professional development opportunities, ongoing areas for development and improvement in order to meet professional and organizational goals and expectations. This is also your opportunity to highlight accomplishments such as program development, awards, research, publications etc. Performance review and professional development planning is an ongoing process which serves to provide a course of action for professional improvement and job enrichment.

## **When can I expect to have my Performance Review and Development Plan Meeting?**

Given the current number of staff employed by TVFHT, there is a need to spread out the timing of these reviews. There is no action required from you until you get an email with specific instructions regarding your performance review and development plan.



## Dispute Resolution Procedure

### Rationale

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**Thames Valley Family Health Team (TVFHT)** recognizes that from time to time, areas of concern or conflicts will occur in the workplace between coworkers. The best outcome is usually a negotiated agreement between the parties. The following procedures set out a process to resolve the concern/conflict through internal mediation.

### Procedure

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1. Initially, all complainants are encouraged to discuss the concern or complaint directly with the person(s) involved with the concern or conflict. Simply bringing the concern to the other party may resolve the issue. This is not a required step; if you are uncomfortable doing so, you can proceed to Step 2.
2. If the concern/conflict is not resolved in the first step, complainants are to present their concern to the attention of their Manager, and be prepared to discuss the following:
  - ✓ What is the issue?
  - ✓ Who has a stake in the issue?
  - ✓ Are there other underlying issues?
  - ✓ What are the unique perspectives of each stakeholder?
  - ✓ What are three potential solutions or action plans?
  - ✓ What resources are needed for the best solution or action plan to work?

If the concern/conflict is not resolved during this meeting, the information collected in the above process will constitute the “concern/conflict file” which will be used in the next step of the process.

3. If resolution is not possible in Step 2, the complainant may submit the complaint in writing to their appropriate Director within ten (10) days of completion of the initial process.
4. The Director will meet with the complainant within ten (10) days of receipt of the complaint. The Manager will provide notes about the nature of the complainants’ concerns, the resolution the complainant is seeking and other information needed to investigate the case.
5. The Director will need to verify evidence provided by the complainant, speak to the other party in the conflict, their supervisor or collaborating physician. The Director may meet with the parties separately, or together, to find ways to resolve the differences. Ultimately, if no solution can be negotiated between the parties, the Director in consultation with the Manager will respond in writing to the complainant and recommend a resolution to the conflict.

Where appropriate, progressive discipline measures will be taken where behaviours/actions have occurred that warrant such action. The decision to impose progressive discipline lies solely with the Director in consultation with the Executive Director.

## Progressive Discipline

### Rationale

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The Thames Valley Family Health Team (TVFHT) supports the progressive discipline process for dealing with job-related behaviour that does not meet the performance standards and expectations of our family health team.

### Process

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The purpose of progressive discipline is to provide feedback to the employee so he/she can correct the problem and improve their overall performance. This process is not intended to punish the employee, but rather assist the employee to overcome performance problems and satisfy the employer's expectations with regards to the job, assisting the employee to become an effectively performing member of the TVFHT.

The progressive discipline process is initiated by a Director or Executive Director.

### Steps of progressive discipline will normally include:

#### 1. Verbal Warning

- Employee will be given a verbal warning regarding undesirable behaviour or action, including details of when actions took place.
- Employee will be given an opportunity to explain the situation from their perspective.
- Future steps of progressive discipline process will be explained to employee. This may include an employee action plan specifying how the employee will ensure that no further incidents take place.
- Verbal warning (incident notes) will be filed in employee's personnel file.

#### 2. Written Warning

- Written warning will be issued to an employee when the event/action has been discussed previously and re-occurred or where the action is considered to be severe enough in nature to warrant skipping the verbal warning step.
- Written warning will include details about action or behaviour, such as when incident occurred and how it evolved; warning will also outline why the action or behaviour is unacceptable.
- Employee will be given an opportunity to explain the situation from their perspective.
- Discussion will involve review of previous action plan (where one exists) and/or further development of an employee action plan that specifies how the employee will ensure that no future incidents take place.
- Warning will be signed by employee (to confirm receipt of document) and document will be filed in employee's personnel file.
- Future steps of progressive discipline process will be explained to employee.

### 3. Unpaid Suspension

- Unpaid suspension will be imposed when the first two steps have been implemented and there is a third incident, or where the action is considered to be severe enough in nature to warrant skipping either or both of the previous steps.
- Employee will be given written documentation regarding the suspension, including details about the undesirable action or behaviour, length or term of suspension and why action or behaviour is unacceptable.
- Suspension notice will be signed by employee (to confirm receipt of suspension notice) and document will be filed in employee's personnel file.
- Future steps of progressive discipline process will be explained to employee.
- Immediately upon return from suspension, a discussion will occur that involves review of previous action plan (where one exists) and further development of an employee action plan that specifies how the employee will ensure that no future incidents take place.

### 4. Termination of employment

- Termination of employment will take place when the first three steps have been implemented and there is a further incident, or where the action is considered to be severe enough in nature to warrant skipping any or all of the previous steps.
- Employee will be given written termination notice, including information about the offence and previous disciplinary communications with the employee. Employee will be escorted from the location, maintaining the dignity of the terminated employee.
- Termination notice will be filed in employee file.
- Record of employment will be mailed to employee.

Under normal circumstances, where policies, procedures or professional practices are ignored or contravened, progressive discipline of employees will be implemented as outlined above. More serious incidents may result in more severe disciplinary action for the initial or subsequent occurrences, up to and including termination of employment.

Examples of intolerable misconduct include:

- Wilful misconduct, disobedience or insubordination
- Abuse/harassment of clients, employees or members of public
- Falsification and/or unauthorized disclosure of patient medical records
- Unauthorized use, removal or destruction of company property
- Unethical behaviour
- Criminal actions

~~Records of disciplinary actions will be removed from the personnel file two years following the date of the discipline, provided the employee's record has been discipline free for that two year interval.~~



## Pregnancy and Parental Leave

### Rationale

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The TVFHT is committed to assisting you and your families during the very exciting time of welcoming a new child into your family. To that end, the TVFHT follows all legislated requirements related to pregnancy and parental leave.

For more information please see the Employee Handbook or for up to date information on your rights for pregnancy and/or parental leave you can visit:

<http://www.labour.gov.on.ca/english/es/pubs/guide/pregnancy.php>

### Procedure

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You are asked to provide the TVFHT with two (2) weeks written notice of your date of leave outlining how many weeks of leave you will be taking. Should you wish to return sooner than originally agreed upon, you must provide the TVFHT with four (4) weeks written notice of the change in the date of return.

In general, a mother's parental leave must begin when her pregnancy leave ends. Otherwise, the parental leave must begin within 52 weeks of the date the child was born or first came into the parent's care. The leave must be taken all at once and cannot be split up.

All benefits will continue during your leave. Vacation time will continue to accrue as though you were actively working. Vacation time cannot be taken immediately prior to a pregnancy leave\*, but may be taken at the end of either a pregnancy or parental leave. The allowable carry over vacation time will be pro-rated based on the time that you are actively working during the fiscal year. If you have any questions, or would like more information, please call your benefits administrator.

You will be reinstated to your former position unless the position has been discontinued in which case a job comparable in both salary and responsibility will be offered.

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\*The reason for this is that pregnancy leave must start no later than the expected due date or delivery date, whichever comes first. If you are on vacation immediately prior to pregnancy leave and you deliver while on vacation, you would immediately be switched to pregnancy leave and the unused planned vacation days would be forfeited.



## Acknowledgement of the Employee Handbook

The Thames Valley Family Health Team Employee Handbook has been prepared for your information and understanding of the values, policies, practices and benefits of our organization. Please take time and read it carefully.

If you have any questions or need clarification about any of the information in this Handbook you can consult Human Resources at any time.

I, \_\_\_\_\_, acknowledge that I have received, read and understand the TVFHT Employee Handbook dated August 2014. I understand that it is my responsibility to comply with the policies and procedures contained in this Handbook.

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Employee Signature

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Employee Name (Please Print)

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Date