

Core requirements: Occupational Health and Safety (OHS) Self-Assessment and Management Tool

1. Introduction and Purpose

- **Goal:** To develop an external-facing web-based tool for member organizations (long-term seniors care and home health support providers in British Columbia) to independently assess their OHS programs (including psychological health and safety), receive tailored recommendations, manage resulting action plans, and visualize key internal OHS metrics.
- **Objective:** Enhance member OHS program effectiveness, provide valuable resources and support pathways, enable data-driven decision-making for members, and offer internal consultants insights into member progress and needs.

2. Scope

- **In Scope:**
 - Member self-registration and login (WordPress-based).
 - A library of scalable OHS self-assessment tools (managed by internal administrators).
 - Automated recommendation engine based on assessment results.
 - Personalized member dashboard displaying assessments, recommendations, action plans, data visualizations, and benchmarking against other members (anonymous data) in their size and category.
 - Member functionality to create/manage OHS action plans (tasks, due dates, completion tracking, document upload).
 - Member functionality to input specified company OHS/HR data points (quarterly/annually).
 - Backend portal for internal consultants to view member progress (assessments, plans, data) and add specific recommendations/resources.
 - Backend portal for internal administrators to manage assessment templates and potentially recommend logic/resources.
 - Integration points with WordPress (content hosting, authentication) and MS Dynamics CRM (consultant interaction logging).
 - Compliance with BC PIPA, including user consent mechanisms and data privacy statements.
 - Mobile optimization to ensure usability on tablets or smartphones.

- User feedback loop to allow users to rate resources or flag issues with assessments.
- Accessibility compliance (WCAG 2.1) to ensure tool use is accessible to users with disabilities.
- **Out of Scope:**
 - Direct integration with Office 365/Azure AD for member authentication.
 - Direct storage or retrieval of member-facing documents from SharePoint (links may be used, but primary hosting is WordPress).
 - Functionality beyond OHS program assessment, recommendations, action planning, and related data tracking as specified.

3. User Roles and Personas

- **Member User (Primary):** Representatives from member organizations (approx. 300 anticipated active organizations). Typically, Site Administrators (HR Rep, CEO, Clinical Care Director, Owner Operator). Responsible for completing assessments, viewing recommendations, managing action plans, and inputting data.
- **Member User (Secondary):** Potential for Safety Committee members or OHS Officers within member organizations to have access (permissions TBD).
- **Consultant User (Internal):** Your internal OHS consultants. Review assigned member progress, log interactions (via Dynamics), and provide targeted recommendations, comments, and resources through the tool.
- **Administrator User (Internal):** Your internal team members are responsible for managing the tool's content, specifically creating, editing, publishing, and managing assessment templates and potentially the associated recommendation logic and resource lists.

4. Functional Requirements (Summary)

- **4.1 Authentication and Access:**
 - Member users register/login via the WordPress website frontend.
 - Consultant and Administrator users access via a secure backend login mechanism (TBD).
 - Strict data segregation must ensure users can only see data pertinent to their own organization (members) or assigned organizations (consultants).
 - New user onboarding with tooltips, onboarding walkthroughs, and a help centre/knowledge database for new users.
- **4.2 Self-Assessment Module (Member Facing):**
 - Browse/select available OHS assessment tools.
 - Complete assessments consisting of mixed question types (primarily checklists).
 - Save assessment progress and return later (optional TBD).

- Submit completed assessments.
- View history of completed assessments.
- Assessment versioning – ability to update assessment tools while maintaining past submissions
- **4.3 Recommendation Engine:**
 - Automatically generate recommendations (links to tools/resources on WordPress, suggested consultations, workshops, other services) based on assessment answers.
 - Utilize a combination of simple mapping rules and potentially complex scoring/logic.
 - Mechanism to handle cases requiring consultant review before recommendations are finalized/displayed (TBD).
- **4.4 Member Dashboard:**
 - **Overview:** Centralized view of assessments, recommendations (system and consultant), action plan summary, and data visualization highlights.
 - **Action Planning:** Create action items/tasks based on assessments/recommendations; assign due dates; mark tasks complete; upload supporting documents (e.g., evidence of implementation).
 - **Data Input:** Form(s) for members to input specified OHS/HR data quarterly/annually (GRTW, WorkSafeBC cases, psych safety cases, investigations, complaints, grievances, EAP utilization, turnover, sick leave hrs, LOA hrs, LTD cases).
 - **Data Visualization:** Display member-inputted data using trend lines over time (showing impact of interventions) and a summary scorecard highlighting key/latest figures.
 - **Benchmarking Capabilities:** Members can compare their results (anonymously) to others in their size/category.
 - **Notifications and reminders:** Automated emails or in-app reminders for assessment due dates or action plan deadlines
 - **Reporting and export options:** Option for members or consultants to export dashboards or action plans as PDFs or reports
- **4.5 Consultant Backend Portal:**
 - View a list of assigned/accessible member organizations.
 - Select a member to view their profile, completed assessments, detailed action plan (tasks, statuses, uploaded docs), and their visualized data dashboard/trends.
 - Dedicated section within the member's view (or linked to it) for consultants to:
 - Upload specific resources.
 - Recommend specific courses (from a managed list?).
 - Add comments/observations visible to the member.

- Trigger/link to MS Dynamics CRM for logging communication activities (calls, emails, meetings).
- **4.6 Administration Module (Internal):**
 - Secure interface for Administrators to:
 - Create, edit, publish, and manage OHS assessment templates (questions, types, structure).
 - Define/manage the rules and logic connecting assessment results to automated recommendations (TBD complexity).
 - Potentially manage lists of standard resources, courses, and services for recommendations (TBD).

5. Integration Requirements

- **WordPress:**
 - Host front-end interface (likely built using Oxygen builder).
 - Host assessment content and resource materials.
 - Manage member user accounts and authentication.
- **Microsoft Dynamics CRM:**
 - Receive data/triggers from the consultant portal to log interaction events (calls, emails, meetings). Exact mechanism (API, deep link, etc.) TBD.
- **SharePoint:**
 - No direct integration for member-facing document storage. Links to relevant documents (hosted on WordPress/publicly) can be included as resources if needed.

6. Non-Functional Requirements (Key Highlights)

- **Scalability:** The system must comfortably support ~300 active member organizations and associated data. The architecture must allow administrators to easily add new assessment tools.
- **Security and Privacy:**
 - Strict compliance with BC PIPA is mandatory.
 - Implement robust security measures to protect sensitive OHS data.
 - Ensure strict data isolation/segregation between member organizations.
 - Implement a clear user consent mechanism during registration/first login.
 - Provide an accessible and clear privacy policy explaining data storage and usage.
- **Usability:** The interface should be intuitive and user-friendly for members (potentially varying technical skills) and internal users (consultants and administrators).

7. Assumptions and Constraints

- Members are external organizations without company-provided O365 accounts.
- The primary content and resource hosting platform is the existing WordPress website.
- Users will have reliable internet access.
- Existing WordPress and Dynamics environments are stable and accessible for integration.