

ERGONOMICS MATCHING FUNDS PROGRAM PROCEDURE



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

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Background

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

Matching Funds Reimbursement

The Risk Management and Insurance Department will match up to 50% (up to a maximum of \$500 in total reimbursement) for office ergonomic equipment costs for approved CSU employees who meet all necessary criteria as outlined in this procedure. Once all matching funds criteria have been met and final approval granted, reimbursement will be provided to the department (as funding is available). The department requesting matching funds is responsible for the initial purchase of equipment and 100% of the initial cost and funding reimbursement of any kind will not be provided to the department until all appropriate documentation and application materials are received (e.g., application completed, proof of purchase provided, etc.).

More than one item or piece of equipment, furniture, etc. can be included in the matching funds application (e.g. chair, table, keyboard, and mouse, etc.); however, reimbursement will only be provided for multiple equipment items *up to the \$500 maximum reimbursement*.

The department requesting matching funds is responsible for payment of any additional costs. For example – applications which have a total cost exceeding \$1000 will only receive the maximum of \$500 in reimbursement from Risk Management regardless of the total equipment cost (total equipment cost can exceed \$1000).

Total matching funds reimbursement shall not exceed \$500 per employee per fiscal year. Only one request per employee per fiscal year is allowed, however, applications may be submitted in subsequent years by the same employee. Requests for funding will be considered on a first-come first-served basis depending on funding availability in a given fiscal year. *Purchases of equipment and reimbursement of funds **must** take place within the **same fiscal year**.*

Financial Need

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

Funding Availability

Available funding for the ergonomics matching funds program is limited and only allows for a total of ~12-15 applications per fiscal year. When this number has been reached, no additional applications will be allowed until the subsequent fiscal year.

Where are Matching Funds Applicable?

Only Colorado State University employees are eligible to apply for matching funds reimbursement. Non-CSU employees are not eligible.

Employees requesting matching funds must complete the matching funds application individually as each application is linked to an individual employee's NETID. Although an employee must apply individually, funding reimbursement can only be made to an employee's department. Employees are **not** eligible for *personal* funding reimbursement (i.e. non-CSU affiliated workstation/environment for personal use). However, matching funds **can** be used for an employee who telecommutes/works from home (assuming that the employee's home department allows for such purchases for the home office for a particular employee. Whether a department will purchase equipment for an employee's home office is at the discretion of that department).

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

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

Products, items, furniture, or equipment **must** be approved by the Ergonomics Program Manager **prior** to purchase if matching funds reimbursement is desired. Products purchased without prior approval **may not** be eligible for matching funds reimbursement. Although a list of recommended ergonomic products can be found on the [Ergonomics Program webpage](#), alternative options not on the recommended equipment list **may** be acceptable for matching funds reimbursement. Inquire before purchase or include such equipment within the matching funds application to determine eligibility.

Applications which are incomplete may be delayed or denied.

Purchasing Equipment

Purchases of equipment **must** take place within the **same fiscal year** reimbursement is expected. Purchases made in a previous fiscal year are **not** eligible for reimbursement. Reimbursement of funds will only take place **following** the departments' purchase of products/items, equipment and/or furniture. (Again, the requesting department is responsible for 100% of the initial purchase of equipment).

It is recommended that if equipment, furniture, etc. is needed to ergonomically improve a workstation/environment for an employee, that the purchase and implementation of equipment, furniture, etc., take place as soon as possible (wherever financially and technically feasible), even if matching funds reimbursement is unavailable.

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

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

Following purchase of equipment by the department, the *requesting employee* will be required to provide the proofs of purchase on their [matching funds dashboard](#). The Kuali document number(s) are required for proof(s) of purchase. To obtain the Kuali document number(s), the requesting employees should contact their departmental accounting person. If the employee cannot determine the Kuali number through their departmental accounting person, please contact the CSU Procurement office.

Procurement Time Limits

Employees/departments must take steps towards procuring the equipment/furniture applied for within a timely manner. Failure to procure equipment within a feasible period, (within 120 days after the submission of the matching funds application) may result in denial of the application. (It is recognized that unforeseen circumstances may present themselves, and in these cases, extensions may be provided, however, if there is no movement towards procurement, denial of the application may take place to allow for other employees/departments to apply).

Criteria for Obtaining Matching Funds

To obtain matching funds reimbursement, the departmental employee must complete certain criteria. The 3 primary steps include:

- 1) Completion of an Ergonomics Training session
- 2) Completion of an Ergonomic Evaluation
- 3) Completion of the Matching Funds application

Employees applying for matching funds are responsible for tracking their progress and ensuring all criteria are met within the allotted time frames. Progress can be tracked through the [matching funds dashboard](#). The [matching funds dashboard](#), which is specific to each employee, allows employees to review their application, evaluation, and training status, due dates, etc. As a step is completed, the “status” notification for that step will be updated automatically. When all criteria have been met, the application materials will be sent electronically and automatically for final review.

If listed criteria are not met within the allotted time frames, the application will be denied, and the employee must re-apply if they so choose. (The schedule-by or expiration dates help ensure quicker movement through the matching funds process and to avoid allocating funds for someone who will not meet all criteria in a timely manner).

Matching Funds Dashboard Example

Instructions

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

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

Matching Funds Status for: Frank Gonzales

Criteria	Status	Date	Must Schedule By
Application	INCOMPLETE	---	---
Ergonomics Evaluation	INCOMPLETE	---	---
Ergonomics Training	INCOMPLETE	---	---

- i. **Complete** - Step Completed (No further action necessary on your part)
- ii. **Incomplete** - Action Needed (Further action is necessary on your part)
- iii. **Pending** - Processing (Nofurther action is necessary on your part)

Requirements for Obtaining Matching Funds (Details)

Training

- To ensure that employees have a basic understanding of office ergonomics and how to best setup their workstation, each employee applying for matching funds must attend/complete a **CSU office ergonomics course**. A list of courses can be found on the [Ergonomics webpage](#). Links to register for or complete training can also be found below and on the [matching funds dashboard](#).
- Employees may attend any **one** of the below CSU office ergonomics related courses, which will fulfill the matching funds training requirement:
 - [Office Computer Workstation Setup \(Work Office\)\(Office Ergonomics Training\)](#)
 - [Home Office Computer Workstation Setup \(Home Office\)\(Office Ergonomics Training\)](#)
 - [Office Ergonomics Training \(In person, Instructor-Led\)](#)
- Completion of a CSU office ergonomics training session must have taken place within the previous 5 years from the date of the matching funds application. Dates of training (if completed) are listed on the [matching funds dashboard](#).
- Employees requesting matching funds must complete/register for an office ergonomics training course within 3 months of their submission of the matching funds application. Failure to do so will result in denial of the application. (Training does not need to be completed within 3 months but registration **must be completed** on the website).

Evaluation

- Employees must have an ergonomic evaluation performed within the last 12 months of the request for matching funds. [Schedule an office ergonomic evaluation on the ergonomics website](#). The date of the most recently completed evaluation will be listed on the [matching funds dashboard](#) (when/if completed).
- A qualified member of the CSU Risk Management Ergonomics team must perform the ergonomic evaluation.
- Either a Level 1 (Concise) or Level 2 (Comprehensive) office ergonomic evaluation can be completed.
- Employees requesting matching funds must **schedule/request** an ergonomic evaluation within 3 months of their submission of the matching funds application form. Failure to do so will result in denial of the application. (The evaluation does not need to be completed within 3 months, but the evaluation request form **must be submitted** on the website).

Application

- Employees must complete a [Matching Funds Application](#), which should indicate the equipment desired, costs of equipment, account number to be used for purchase, etc. It is the responsibility of the employee/department to determine the costs of equipment.
- An application **can be** submitted **prior** to completing other matching funds criteria (i.e., ergonomic evaluation and training), however, **employees are encouraged to complete the application as the final/last step** in the process. See below for suggested matching funds process flow.
- Following the completion of ergonomic evaluation and training, the matching funds application will be submitted and reviewed by the ergonomics program manager who will provide final approval/denial.

Equipment Trial

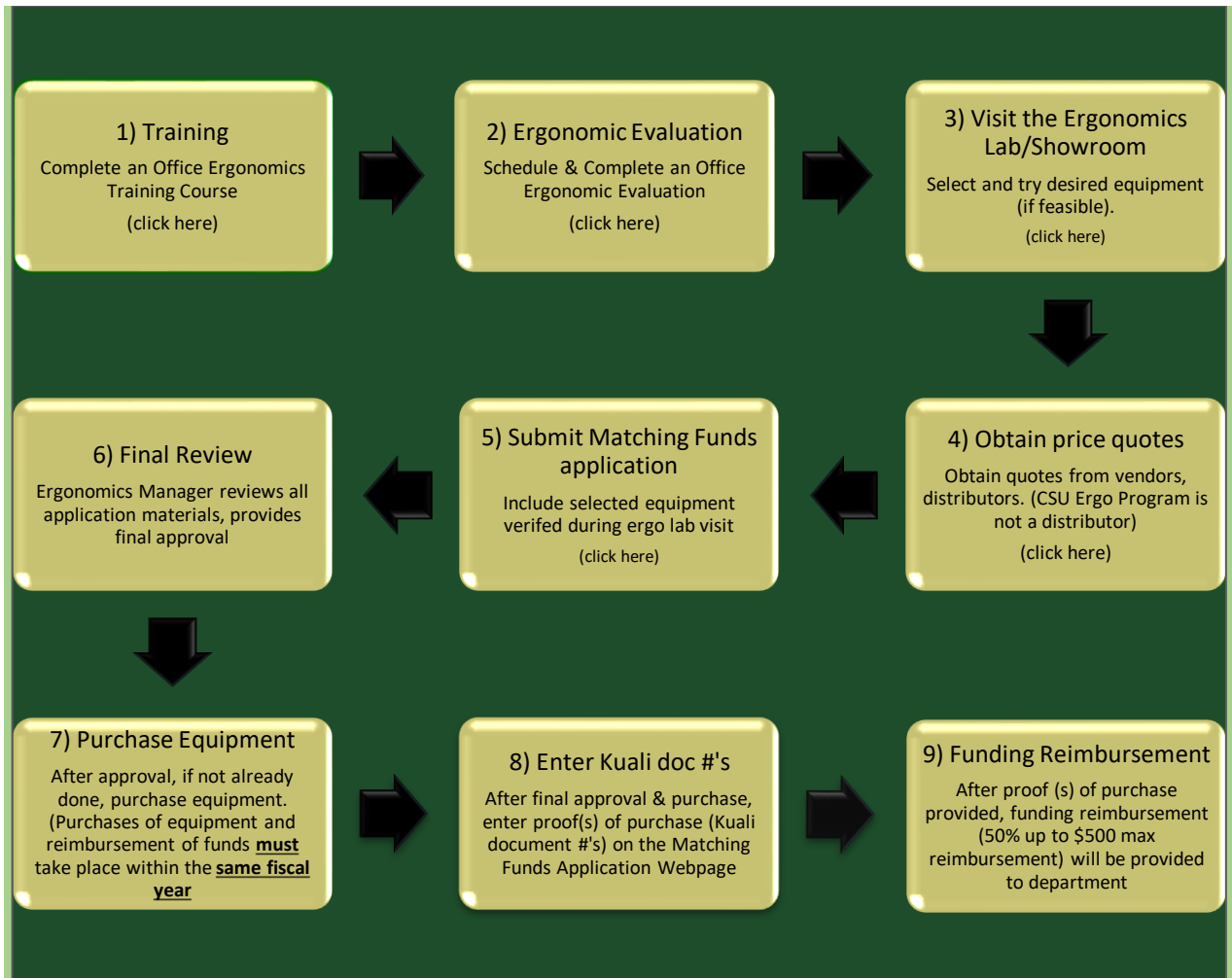
- Employees should try the desired piece of ergonomic equipment, piece of furniture, etc. offered through the Ergonomics Showroom (Ergolab), or Ergonomics Loan Program prior to purchase (if feasible). This will help ensure the employee understands what is to be purchased and can use the equipment properly. Although trial is *not* required, it **is recommended** wherever possible.
- The Ergonomics Loan Program allows employees to try recommended ergonomic office products that are available at no charge to the department. For a list of recommended products, go to the [Ergonomics website](#). Not all products listed on the website are available for trial/loan.
 - Available equipment **can** be loaned/taken to an employee's home office (if needed).
- Along with equipment loans (where feasible), CSU provides an ergonomics showroom (ergolab) which contains a variety of equipment and furniture for review and trial. The ergolab is available by appointment only. Visit the [ergonomics website](#) to request a showroom visit.
- As mentioned above, if equipment or furniture is desired for purchase but is not part of the Recommended/Approved CSU Ergonomics Equipment list, it must be reviewed and approved by CSU Ergonomics Program staff before it will be considered for reimbursement as part of the matching funds program. Purchases of equipment or furniture that are not approved by CSU Ergonomics Program staff may be denied for matching funds reimbursement.

How are Matching Funds Processed?

Once all criteria have been met (ergonomic evaluation, training completion, completion of the application) matching funds materials will be reviewed for final approval. Final decisions on whether the request for funds has been approved and funding reimbursement will be provided to the department will be made as soon as possible but only after ***all*** matching funds criteria have been met and all application materials received. If approval is granted, the employee/department will be notified via email. The employee must then provide necessary purchasing documentation so that funding reimbursement can be provided. Employees can provide the CSU Quali document number into their matching funds application or send an email to the [ergonomics team](#).

Recommended Matching Funds Process Flow

Below is **not a mandatory** process for matching funds reimbursement eligibility, however, this is the **recommended** course of action. Click the buttons below (if applicable) for additional information and shortcuts to the appropriate webpages.



Definitions

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

Contacts

Frank Gonzales, M.Ed., CPE, CIE
Certified Professional Ergonomist
Ergonomics Administrator

Office of Risk Management & Insurance
Colorado State University
(970) 491-2724
Frank.Gonzales@colostate.edu

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