

## Customer Service Policy

### **Policy Statement**

CMLS Financial (CMLS) is committed to providing its products and services in a manner that respects the dignity and independence of people with disabilities.

The CMLS Accessible Customer Service Policy Statement is about recognizing that people with disabilities may have different needs. CMLS is committed to creating an environment that is accessible for all customers – including those with disabilities. In keeping with this commitment, CMLS strives to eliminate barriers and improve accessibility for persons with disabilities in a manner that respects dignity, independence, integration and equal opportunity.

This is in accordance with the Accessibility for Ontarians with Disabilities Act, Ontario Regulation 429/07, Accessibility Standards for Customer Service.

### **Purpose and Background**

This document has been prepared in accordance with the accessibility requirements of Ontario Regulation 429/07 Accessibility Standards for Customer Service under the Accessibility for Ontarians with Disabilities Act, 2005.

The Accessibility for Ontarians with Disabilities Act, 2005 (AODA) is a Provincial Act that was created for the purpose of developing, implementing and enforcing a specific set of accessibility standards that would improve accessibility for people with disabilities across the Province as it relates to products, services, facilities, accommodation, employment, building structures and premises on or before January 1, 2025.

### **Our Guiding Principles**

The Executive team and the employees of CMLS believe in delivering excellent customer service. CMLS will use reasonable efforts to ensure that its policies, practices and procedures are consistent with the following principles:

- Our products and services are provided in a way that respects the dignity and independence of people with disabilities;
- Our customers, including people with disabilities have the same opportunity to access our products and services and to allow them to benefit from our products and services in a similar way as other customers;
- Persons with disabilities are given an opportunity equal to that given to others to obtain, use or benefit from CMLS' products or services;
- Communications with a person with a disability are conducted in a manner that takes the person's disability into account;
- Persons with disabilities may use assistive devices, service animals and support persons as is necessary to access CMLS's goods and services unless superceded by other legislation.

## Providing Products & Services to Persons with Disabilities

### **Communication**

We will communicate with persons with disabilities in a manner that takes into account his or her disability for the purpose of using, receiving and requesting products and services.

We will train our employees who communicate with customers on how to interact and communicate with persons with various types of disabilities.

We will train our employees to communicate with our customers in a clear language that respects the dignity and independence of persons with disabilities.

We will provide sufficient space in seating areas to accommodate service animals, or support persons, or provide accessible meeting rooms to communicate with persons with disabilities.

We will offer to communicate with customers in alternate formats, i.e., email, writing, fax, or using their relay services such as Teletypewriter (TTY), if telephone communication is not suitable to their communication needs or if it is not available.

### **Assistive Devices**

We are committed to serving persons with disabilities who use assistive devices to obtain, use or benefit from our products and services. We will ensure that our employees are trained and familiar with various assistive devices that may be used by customers with disabilities while accessing our services. It is the responsibility of the person with the disability to ensure that his or her assistive device is operated in a safe and controlled manner at all times.

### **Use of Service Animals**

We welcome customers with disabilities and their service animals to CMLS' premises that are open to the public and other third parties. Please note that proof of requirement for a service animal and confirmation that the animal is a certified service animal may be required upon request from CMLS.

It is the responsibility of the person with disability to ensure that his or her service animal is kept in control at all times. We will also ensure that all employees dealing with the public are properly trained in how to interact with persons with disabilities who are accompanied by a service animal.

### **Support Persons**

We welcome support persons who accompany persons with disabilities. Any person with a disability who is accompanied by a support person will be allowed to enter CMLS' premises with his or her support person. At no time will a person with a disability who is accompanied by a support person be prevented from having access to his or her support person while on our premises. If there is confidential information to be disclosed, consent must be received from the person with the disability.



### **Training for Employees**

CMLS will provide training to employees who interact with customers residing within Ontario. These employees will be trained on policies, practices and procedures that affect the way services are provided to persons with disabilities.

Training will include the following:

- The purpose and application of this policy;
- A review of the purposes and requirements of the Accessibility for Ontarians with Disabilities Act, 2005 and the requirements of the Accessibility Standards for Customer Service requirement;
- How to interact and communicate with persons with various disabilities;
- How to interact with persons with disabilities who use an assistive device or require the assistance of a service animal or a support person;
- Instruction on CMLS' policies, procedures and practices related to Accessibility Standards for Customer Service;
- What to do if a person with a disability is having difficulty accessing CMLS' services, policies and/or facilitates.

Employees will also be kept informed on an ongoing basis when changes are made to these policies, practices and procedures. Newly hired employees will be trained within 6 weeks of their start date. CMLS will maintain records of all training conducted pursuant to this policy.

### **Feedback Process**

CMLS is committed to providing exceptional customer service and ensuring accessibility for People with Disabilities. Comments on our policies, practices and approach to ensuring accessibility are welcome and appreciated.

Feedback may be provided by a person with a disability in the manner deemed most convenient to them, such as in person, by telephone, in writing, or by delivering an electronic text or by email or otherwise to the contact below. Customers can expect to receive a response within two (2) business days.

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### **Modifications to this or other Policies**

As part of our commitment to developing customer service policies, we will strive to respect and promote the dignity and independence of persons with disabilities. This policy will be posted on the CMLS external website. This customer service policy is available in alternative formats upon request. Our customer service policies will be reviewed and amended from time to time to ensure we are complying with legislation and following best practices.

### **Questions about this Policy**

The purpose of this policy is to provide the guiding principles CMLS follows as it relates to Accessibility for People with Disabilities. Any questions about this policy should be directed to Anne Veloso, Director, Human Resources.