

Preliminary Executive Questionnaire

A short assessment to identify WSIB/WSIAT capacity, pressure points and the appropriate scope for a WorkAid pilot.

Union / Local		Approx. Membership	
Executive Contact		Position	

1. CURRENT WSIB REPRESENTATION

Who currently assists members with WSIB matters? (check all that apply)

- | | | |
|--|---|---|
| ☐ Dedicated WSIB rep(s) | ☐ Stewards / union reps | ☐ In-house legal |
| ☐ External lawyer/paralegal | ☐ Members self-represent | ☐ Other |

Number regularly handling WSIB Experience: ☐ Extensive ☐ Moderate ☐ Basic ☐ Limited

2. VOLUME & CAPACITY

Approximate WSIB matters assisted with annually: ☐ <25 ☐ 25-50 ☐ 51-100 ☐ 101-250 ☐ 250+ ☐ Unknown

Annual WSIB appeals Annual WSIAT matters

Sufficient internal WSIB capacity? ☐ Yes ☐ Usually ☐ Sometimes ☐ No ☐ Unsure

3. CURRENT PRESSURE POINTS

Where is the union experiencing difficulty? (check all that apply)

- | | | | | |
|---|--|------------------------------------|---|---|
| ☐ Excessive caseload | ☐ Backlogs | ☐ Deadlines | ☐ Medical evidence | ☐ Complex claims |
| ☐ Psych claims | ☐ RTW / suitable work | ☐ Appeals | ☐ WSIAT | ☐ Member communication |

4. MEMBER ACCESS & FILE CONTROL

When does the union typically become involved?

- | | | | | |
|------------------------------------|---------------------------------------|---|---------------------------------------|---------------------------------------|
| ☐ At injury | ☐ Claim filing | ☐ Problems arise | ☐ After denial | ☐ Appeal stage |
|------------------------------------|---------------------------------------|---|---------------------------------------|---------------------------------------|

Centralized system showing active files, responsible rep, next action and deadlines? ☐ Yes ☐ Partially ☐ No ☐ Unsure

Could another rep readily take over if an experienced WSIB rep left tomorrow? ☐ Yes ☐ Mostly ☐ With difficulty ☐ No

5. EXTERNAL ASSISTANCE

Current use of external lawyers/paralegals for WSIB/WSIAT: ☐ Regularly ☐ Occasionally ☐ WSIAT only ☐ Complex only ☐ Never

Approx. annual external spend (if known)

6. WHERE WOULD ADDITIONAL CAPACITY HELP?

- | | | | | |
|--|---|---|---|--|
| ☐ Initial intake | ☐ File review / strategy | ☐ Medical evidence | ☐ Psych claims | ☐ LOE disputes |
| ☐ RTW / suitable work | ☐ PI / NEL | ☐ Objections / ITOs | ☐ ARFs / submissions | ☐ WSIB appeals |
| ☐ WSIAT | ☐ Complex cases | ☐ Overflow / backlog | ☐ Rep training | ☐ Deadline management |

7. EXECUTIVE PRIORITIES

What are the three most significant WSIB/WSIAT issues you would like to improve?

1.
2.
3.

8. POTENTIAL PILOT

Which initial pilot structure would you be most interested in exploring?

- | | | | |
|---|--|--|--|
| ☐ Complex cases | ☐ Appeals / WSIAT | ☐ Overflow capacity | ☐ Support existing reps |
| ☐ Managed WSIB service | ☐ Backlog project | ☐ Training + consultation | ☐ Recommend after audit |

Preferred pilot duration: ☐ 3 months ☐ 6 months ☐ Other ☐ Open to recommendation

9. ONE QUESTION THAT MATTERS MOST

If you could change one thing about how your union currently handles WSIB matters, what would it be?

WHAT HAPPENS NEXT

WorkAid will use this preliminary assessment to conduct a focused WSIB/WSIAT Capacity Audit. The union will receive a current-capacity assessment, gap/risk analysis, recommended division of responsibilities, and a customized pilot proposal with appropriate hourly, monthly, per-matter or hybrid pricing options.