

# Office Ergonomics Assessment Quick Reference Guide

Use the *Office Ergonomics Assessment Quick Reference Guide* to assist you in a step-by-step process to conduct the office ergonomics assessment. The *Guide* also offers you tips and techniques to enhance assessment effectiveness.

## Logistics

### Assessment notification and scheduling

- Once you've been notified of the need for the assessment, contact the individual to schedule the assessment.
- A typical assessment will take approximately 30 minutes to complete.

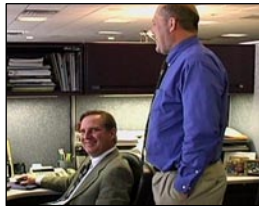
### Assessment worksheet and equipment

- Have your assessment worksheets and other equipment (tape measure, camera, sample equipment, etc.) available as needed with you for the assessment.

## Conduct Assessment

### Introduction

- If needed, introduce yourself to the person being assessed.
- Provide background that you are member of the Ergonomics Assessment Team.
- If the person is seated, obtain a chair so you can sit with them as you conduct the interview and assessment.
- Outline the objectives of the assessment:
  - Understand pertinent ergonomics related issues that the person is experiencing.
  - Will go through a step-by-step ergonomics assessment to determine ergonomics issues.
  - As feasible, will "fix" whatever is possible at the time of the assessment.
  - In some cases, may need to obtain additional assist with equipment modifications or changes.
  - Indicate follow-up will be available as needed regarding recommendations.
  - Indicate you may take some pictures and a set of measurements as part of the assessment.
  - Let them know the bottom line objective is to assist them to take full advantage of the ergonomics furniture, equipment and work processes in their workstation.
- Ask them if they have any questions as you get started with the assessment.



### Background information

- Talk with the person to obtain the Background Information including Demographics, Work Activity, Reason for the Assessment and any other information deemed pertinent.

- Respect the confidentiality of the information and make sure the person is aware that you are only requesting information specific to the ergonomics assessment.

### Observe typical work routine

- Ask the person to perform their typical work tasks. Have them actually perform some purposeful work. The objective is to have them get involved in what they are doing so they will somewhat forget the fact you are watching them. You may need to watch them for several minutes to get a good idea of what the typical routine consists of.
- If need be ask them to perform specific activities that they expressed concern about or that you have additional questions about.
- If you are using a camera, you may ask them to "freeze" position so you can obtain the desired picture. In many cases the pictures are a valuable educational tool to show the person exactly what they are doing that may be at issue.
- At this point you probably have identified some specific issues in terms of workstation set up, equipment used, etc. your next step will be to go through the step-by-step assessment and fill out the worksheet.

### Chair

- Have the person step-by-step go through and learn about the adjustment features of the chair.
- As much as possible, have them try out the features themselves. If needed, you also can demonstrate the adjustment features of the chair to the person to help them learn how to adjust the chair.
- Let them know initially the objective with the chair is to help them become familiar with the adjustment features and then the proper set-up for them.
- Discuss with them the "upright keyboard" and "conversation" chair positions and have them practice going between the two positions.
- Discuss the 30/30/30 concept of physical movement throughout the day. Recall this promotes short physically active micro-breaks (30 to 60 seconds in length) taken about every 30 minutes or so and used for the next 30 days and beyond to make the micro-breaks the habit.
- Document the chair features, indicate if there is an issue or not and fill out the Comment and Recommendation sections.

## Worksurface

- Document the features of the worksurface.
- Indicate if there are issues and fill out the Comment and Recommendation sections.

## Foot support/clearance

- Document if there are any foot support or clearance issues.
- In some cases the feet may be supported on the floor, but addition of a foot rest provides for alternative foot and leg position while seated.

## Keyboard tray

- Indicate if there is a keyboard tray in place and its adjustment features. Make a determination if the keyboard tray is appropriate or if it should be removed.
- Particularly for shorter individuals, the keyboard tray may be in the way as they try to reach to materials on the worksurface.

## Keyboard

- Document the type of keyboard in use and determine if any keyboard use issues are apparent.
- Look at the interaction between position of the keyboard and mouse to determine if the keyboard allows proper mouse placement.
- If a different configuration keyboard is contemplated, discuss the need for appropriate trial time on the users part to make sure the keyboard is acceptable. This typically is at least one week of trial.

## Mouse

- Document the type of mouse in use and determine if there are any mouse use issues.
- Pay close attention to any mouse wrist rest in use and ensure that it does not "anchor" the wrist in one location forcing excessive side-to-side and motion.
- Reinforce the concept that the best use of a mouse is as little use as possible and encourage keyboard shortcut use.

## Computer

- Document the type and location of the computer and indicate if there are any computer placement issues.

## Monitor

- Document the type and number of monitors. Evaluate head and neck position while viewing the monitors to determine any out-of-neutral head and neck position.
- If dual monitors are in use determine proper alignment based on Primary/Primary or Primary/Secondary use.

## Document holder

- Determine if document holders are appropriate. In many cases document holders are no longer needed because less and less hardcopy documents are in use.

## Telephone/Webcam

- Determine configuration of the telephone (headset/handset/speakerphone)/webcam and assess the amount of out-of-neutral head and neck position if a handset/webcam is in use. A headset may be
- needed. Determine if the telephone location on the worksurface is appropriate based on which hand is used to dial the phone. Determine if webcam is ok.

## Storage

- Assess desktop and file storage, document any issues found and provide Comments and Recommendations as indicated.

## Illumination

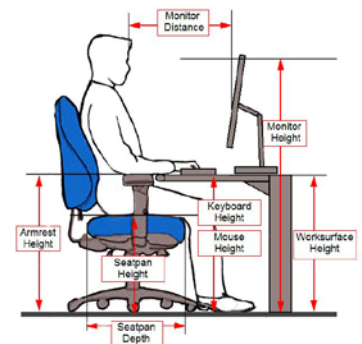
- Assess overhead and task lighting, document any issues found and provide Comments and Recommendations as indicated.
- Recall that the best way to improve task lighting is to not add additional overhead light but rather add specific task light directed to the location needed.

## Other

- Indicate if there are other issues identified during the assessment.

## Recommended Specifications

- Take the measurements.
- Complete the Recommended Specifications section.



## Summarize Findings

- Summarize the findings of the assessment with the person and clarify any Comments and Recommendations.
- Establish the Action Plan with the person with a timeline. This includes actions taken by the person or others needed to accomplish the Recommendations.
- As you complete the assessment ensure the individual has had their questions answered as possible.

## Follow-up

- Schedule any follow-up assessments as indicated.