

## Accessible Customer Service Policy

### 1. Statement of Commitment

FinancialForce.com Canada, Inc. (“**FinancialForce**”) is committed to treating all people in a way that allows them to maintain their dignity and independence. We will endeavour to provide our goods and services in a way that respects the independence and dignity of all persons and encourages integration and equality of opportunity. We are committed to meeting the needs of people with disabilities in a timely manner, and will do so by preventing and removing barriers to accessibility and meeting accessibility requirements under the *Accessibility for Ontarians with Disabilities Act, 2005* (the “**AODA**”).

### 2. Definitions

**Assistive Devices** – Devices that include technical aids, communication devices, medical aids and other supports that are used by persons with disabilities to enable them to carry out the activities of daily living.

**Barrier** - Anything that prevents a person with a disability from fully participating in all aspects of society because of his or her disability, including a physical barrier, an architectural barrier, information or communications barriers, an attitudinal barrier, a technological barrier, a policy or practice.

**Disability** – As defined by the AODA and the *Ontario Human Rights Code*, a disability is:

- Any degree of physical disability, infirmity, malformation or disfigurement that is caused by bodily injury, birth defect or illness and, without limiting the generality of the foregoing, includes diabetes mellitus, epilepsy, a brain injury, any degree of paralysis, amputation, lack of physical co-ordination, blindness or visual impediment, deafness or hearing impediment, muteness or speech impediment, or physical reliance on a guide dog or other animal or on a wheelchair or other remedial appliance or device,
- A condition of mental impairment or a developmental disability,
- A learning disability, or a dysfunction in one or more of the processes involved in understanding or using symbols or spoken language,
- A mental disorder, or
- An injury or disability for which benefits were claimed or received under the insurance plan established under the *Workplace Safety and Insurance Act, 1997*.

**Service Animal** – An animal used by a person with a disability for reasons relating to his or her disability where it is readily apparent that the animal is used by the person for reasons relating to his or her disability; or where the person provides a letter from a physician or nurse confirming that he or she requires the animal for reasons relating to his or her disability.

**Support Person** – A person who accompanies a person with a disability in order to help with communication, mobility, personal care or medical needs or with access to goods or services. A support person can be a paid professional, a volunteer, a friend or a family member.

### 3. Communication

FinancialForce will communicate with persons with disabilities in ways that take into account their disability and respects their dignity.

#### 4. **Assistive Devices**

FinancialForce is committed to serving people with disabilities who use assistive devices to access our goods and services. Persons with disabilities may use their assistive devices as required in accessing goods and services provided by FinancialForce. Exceptions may occur if FinancialForce determines that the assistive device may pose a health and safety risk to the person with a disability or to others. In such cases, FinancialForce will make every effort to ensure that other measures are made available to enable the person with a disability to access FinancialForce's goods and services.

It is the responsibility of the person using the assistive device to ensure that the assistive device is operated in a safe and controlled manner at all times.

FinancialForce will provide assistive devices to persons with disabilities where reasonable and necessary.

#### 5. **Support Persons**

FinancialForce is committed to serving people with disabilities who are accompanied by a support person in order to access our goods and services. Any person with a disability who is accompanied by a support person will be allowed to enter FinancialForce's premises with their 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.

FinancialForce may require a person with a disability to be accompanied by a support person while on the FinancialForce's premise in situations where it is necessary to protect the health and safety of the person with a disability or the health and safety of others on the premises.

#### 6. **Service Animals**

FinancialForce is committed to welcoming persons with disabilities who are accompanied by a service animal when accessing our goods and services on the parts of our premises that are open to the public and other third parties. It is the responsibility of the person using the service animal to ensure that the service animal is kept in control at all times. If a service animal is excluded from our premises by law, FinancialForce will make every effort to ensure that other measures are made available to enable the person with a disability to access FinancialForce's goods and services.

#### 7. **Service Disruptions**

Where there is a temporary disruption to services, FinancialForce will take reasonable steps to notify persons with disabilities who might be affected by the disruption. In particular, FinancialForce will identify the reason for the disruption, its anticipated length, and information about alternative services. Notice may be provided by posting information to our website or, for disruption of our services resulting from salesforce.com platform disruptions, on trust.salesforce.com.

#### 8. **Availability of Documents**

All documents that detail FinancialForce's accessibility policies and procedures will be posted on FinancialForce's website, as appropriate, and will be made available upon request. FinancialForce will make every effort to make the information available to persons with disabilities in a format that takes into account their disability.

## 9. Training For Staff

FinancialForce will ensure that all employees, volunteers and others who deal with the public or third parties on FinancialForce's behalf and all those who are involved in the development and approvals of accessibility policies, practices and procedures receive training. The training will include the following:

- An overview of the AODA and the requirements of the *Human Rights Code* and the accessibility standards;
- How to interact and communicate with people with various types of disabilities;
- How to interact with people with disabilities who use an assistive device or require the assistance of a service animal or a support person;
- How to use the assistive devices available on the premises that may assist with the provision of goods or services to persons with disabilities;
- What to do if a person with a disability is having difficulty in accessing the FinancialForce's services; and
- FinancialForce's policies, practices and procedures relating to the *Accessibility Standards for Customer Service*.

Training will also take place on an ongoing basis when changes are made to FinancialForce's policies, practices and procedures.

## 10. Feedback Process

FinancialForce welcomes feedback on the ways in which it provides its customer service to persons with disabilities. Individuals are encouraged to provide their feedback directly to the Legal and Security Department, which will be responsible for investigating the matter and determining the actions to be taken. Feedback may be provided by the methods below:

Mail:  
Legal and Security Department  
FinancialForce.com, inc.  
595 Market St., Suite 2700  
San Francisco, CA 94105

E-mail: [accessibilityfeedback@financialforce.com](mailto:accessibilityfeedback@financialforce.com)

Telephone: 647-951-1402

In all cases, every effort will be made to respond to the feedback in a timely and effective manner.

## 11. Questions

If anyone has a question about this policy, please contact the Legal and Security Department at [accessibilityfeedback@financialforce.com](mailto:accessibilityfeedback@financialforce.com) or 647-951-1402 or at the address below:

Legal and Security Department  
FinancialForce.com, inc.  
595 Market St., Suite 2700  
San Francisco, CA 94105