Office ergonomics assessor worksheet

saifcorporation

Instructions: Use this worksheet to document the workstation measurements, adjustments, and recommendations made to the workstation being assessed. A workstation measurement guideline is located on the back of this form.

Date: Business name: Employee name: Phone: Job title:

Assessor name: Phone: Did the employee view the ergo video? ☐ Yes ☐ No

Workstation type: ☐ Systems (panel hung) ☐ Nonadjustable (wood or metal desk) ☐ Freestanding height adjustable ☐ Split workstation ☐ Standing workstation

Work assessment

Reviewed previous assessment ☐ Yes ☐ No ☐ Not applicable Dominant hand ☐ L ☐ R

Work schedule/shift:

Job description, notes from previous assessment:

General information. Check all that apply.

☐ PDA ☐ Laptop
☐ Touchscreen ☐ Shared workstation
☐ Mobile workstation ☐ Telecommuter

Use this section to describe the person's activity throughout the day. Consider categories separately. The total may be more than 100 percent.

Computer: _____% Phone: _____% Reading hard copy: _____%

10 key/calculator: _____% Paperwork done by hand _____%

Copying, collating, and stapling: _____% Other _____% Describe:

Workstation adjustments Record measurements here. Round to the nearest 1/2 inch. A guideline is located on the back of this sheet.

Person's measurement	Equipment measurement	Adjustment needed?	Describe adjustments, barriers to adjustments, and equipment changes needed.
STEP 1 Knee to floor	Seat height	☐ Yes ☐ No	Adjust seat height and seat pan angle.
STEP 2 Popliteal length and seat width ☐ Adequate ☐ Inadequate	Initial number of finger spaces	☐ Yes ☐ No	Adjust seat pan depth and back rest depth. Note seat position type.
STEP 3 Lumbar height	Back rest lumbar height	☐ Yes ☐ No	
STEP 4 Elbow to floor a. Seated b. Standing	Writing surface height c. Seated d. Standing	☐ Yes ☐ No	
STEP 5 Keyboard tray Does the person have a keyboard tray? ☐ Yes ☐ No	Keyboard tray height a. Seated b. Standing	☐ Yes ☐ No	
STEP 6 Monitor height a. Seated b. Standing From surface to height of eyebrow	Top of screen c. Seated d. Standing	☐ Yes ☐ No	
STEP 7 Distance to Monitor	Size of monitor measured diagonally 1) 2)	☐ Yes ☐ No	
STEP 8 Additional workstation information (Describe placement of additional items)			
Keyboard Note keyboard type. ☐ Adequate ☐ Inadequate		☐ Yes ☐ No	
Pointing device Note device type. ☐ Adequate ☐ Inadequate		☐ Yes ☐ No	
Peripherals (for example: phone/headset, copy holder, printer, shelves, task lighting)		☐ Yes ☐ No	

Additional comments (lighting, housekeeping, leg space, reaching, chair casters, other needs, discussions, etc.)

Summary of recommendations

Follow-up is recommended to ensure changes are kept or modified as necessary once new equipment or changes are in place.

☐ Two weeks ☐ One month Date: ☐ Completed

Additional follow-up?

When? Why?

Instructions
Use this sheet as a guideline to workstation assessment and chair measurements. Write your results and comments on the front of this sheet. (Your agency may require you to fill out an agency-specific ergonomic worksheet.)

Assessment preparation
Make sure you have a tool to use for measuring and review any prior assessments. Introduce yourself and explain why you are doing the assessment, how the information is used, and why it is important. Explain that you need to be in their "personal space" and ask permission.

Interview
Ask about the employee's job, responding to the items listed under "Work Assessment" on the front of this sheet. This helps you focus on where the person spends the most time and on what duties. Ask about the percentage of time spent in each area, keeping in mind that many activities are done simultaneously (like taking notes on the computer while talking on the phone) and usually will add up to more than 100 percent. Ask questions necessary to understand the work load, frequent movements, commonly used tools, etc. This helps you determine what recommendations to make.

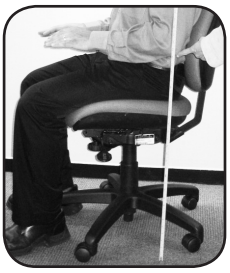
Observe
Note how the workstation is configured, then watch for several minutes to see how the person uses the work area. Pay attention to posture and note awkward body positions. Begin to think about adjustments to achieve neutral or better postures.

STEP 1: Knee to floor
Determines seat height and cylinder size. Ask if the person's shoes are the ones normally worn. Take the knee-to-floor measurement with the person standing and pointing to the top of the knee cap. Measure from there to the floor. If you are adjusting for the open angle position, use the knee-to-floor measurement to set the height of the chair seat. For 90-90-90 or for Grandjean positions, subtract one to two inches. Set the chair to this height with the person seated in it, measuring from the floor to the middle of the top edge of the seat. Use the seat height adjustment control on the chair to raise or lower the seat to the correct knee-to-floor measurement. Now adjust seat pan tilt and tension, angling the seat to the person's comfort level for open angle seating. An angled seat pan also raises the elbows to accommodate taller desks. It puts the feet more firmly on the floor and opens the hip angle to greater than 90 degrees. Set the seat pan horizontal for 90-90-90 seating. Although 90-90-90 seating is most commonly used, it is the least beneficial seated posture.

STEP 2: Popliteal length and seat width
(distance from the back of the buttocks to the back of the knee) Ask the person to sit forward in the chair, away from the backrest and place a pad of paper or a clipboard between the lower back and the backrest. Ask the person to move back in the chair until he or she is in contact with the backrest. Take the measurement from the paper or clipboard to the back of the knee to determine the seat depth needed. Using the seat slider control, adjust the seat pan forward or backward to provide two to three finger widths of space between backside of the knee and the front edge of seat pan. Verify two finger-widths of space between thigh and edge of seat pan and check appropriate box.

STEP 3: Lumbar height
Determines how high the seat back should be. The lumbar curve in the back of the chair must match the natural curve of the lower back. Ask the person to move forward on the seat pan and place the back of one hand in the middle of the lumbar curve. Then measure from the seat pan to the middle of that hand. Record this measurement. Adjust the back of the chair to align lumbar support with the lumbar curve. Ask the employee to sit back against the chair back to check the adjustment. Measure the distance from the top of the seat pan to the center of the lumbar curve of the backrest and record that measurement.

STEP 4: Elbow to floor
(a) Seated measurement: Ask the seated person to bend arms so forearms are parallel to the floor. Measure from floor to point of elbow. **(b)** Standing measurement: With the person standing and forearms still parallel to the floor, measure from floor to point of elbow. **(c)** Seated writing surface height placement: Place writing surface at seated elbow-to-floor measurement. **(d)** Standing writing surface height placement: Place writing surface at standing elbow-to-floor measurement.

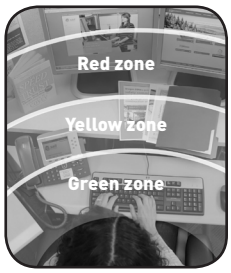


STEP 5: Keyboard tray
(a) Seated keyboard height placement: Measure from the floor to place the keyboard on a support surface that is one to two inches lower than the seated elbow-to-floor measurement. **(b)** Standing keyboard height placement: Measure from the floor to place the keyboard on a support surface that is one to two inches lower than standing elbow-to-floor measurement. Change both sitting and standing placements to maintain the neutral wrist posture. Work towards a comfortable negative slope on the keyboard.

STEP 6: Monitor height
(a) Seated eyebrow height measurement: Determines the approximate screen height for the monitor. Measure from the top of the work surface to the eyebrows with the person seated and head in a neutral position. **(b)** Standing eyebrow height measurement: Measure from the top of the worksurface to the eyebrow with the person standing and head in neutral position. **(c)** Seated top-of-screen placement: Adjust the top of the monitor about one-third lower than this measurement. (Multiply eyebrow height measurement by .35) **(d)** Standing top-of-screen placement: Adjust the top of the monitor about one-third lower than this measurement. (Multiply eyebrow height measurement by .35) A properly adjusted monitor allows the person to view the screen with the head neutral, not tilted back or forward. Note: Screen height may vary, depending on factors such as corrective lenses and where the person works on the screen. For example, if the person's job requires working at the bottom of the screen, adjust the monitor higher for comfort.

STEP 7:
Distance to monitor
Determines the approximate viewing distance between employee and monitor screen. This varies considerably between people, but is usually between 16 and 29 inches. The monitor may be moved closer or farther away, depending on personal comfort. Measure horizontally from the person's eyes to the front of the monitor while the person is standing at the work station or seated in a neutral working posture.

STEP 8:
peripheral items
Check all the peripherals, including phone, shelves, footrests, floor mats, chair casters, task lighting, etc. Observe for awkward or strained postures and make adjustments as needed. Refer to information on Workstation Ergonomics Leverage Zones to optimize placement of desk equipment. Assess the lighting in the room to make sure it is appropriate.



Closing
When finished, fill out SAIF's "Ergonomic Workstations" card for the person to keep. We also recommend that you keep a copy of your assessments. Explain that you'll check in to see how the adjustments are working or to see if they have any questions or concerns. Schedule a follow-up appointment two weeks to one month from the original assessment date. You can conduct the follow-up over the phone or in person. Determine if follow-ups are needed.