

PATHWAYS ABILITIES SOCIETY

PROCEDURE: ENTRANCE, TRANSFER, INCREASE AND DISCONTINUATION

Applies to: All Personnel, Persons served, Families, Advocates, Caregivers and Funding Body

Original Effective Date: April 28, 2003

Effective Date: October 18, 2021

Replaces Procedure Dated: October 18, 2019

New Referral or Service Request

1. The Community Living British Columbia (CLBC) Liaison Worker identifies person to receive support for globally funded spots and sends a CLBC referral. The referral is given to Community Placement Developer (CPD).

2. If the request is for private, non-global CLBC funding or a new funding source, they are referred to the executive director.

3. The executive director:

- Contacts the person seeking private, non-global CLBC funding or with the new funding to determine the type of service they want.
- Notifies the CPD to complete the intake if proceeding with the service provision.

Referral or Service Request Intake

1. The CPD:

- Enters the information into the ShareVision Service Referral Tracker list.
- Informs the area supervisor or manager and the executive director by email that a placement has been initiated.

2. Referrals to:

- Activity Service: The CPD sets up a site orientation meeting and invites the individual and caregiver and/or family member to come for lunch at the location they have been referred to. The CPD and a supervisor explain the services and gives them a "Getting to Know You" form and schedule of events. If the person is seeking employment and not activity services, the CPD refers the person back to CLBC for a referral to Integrated Career Opportunities (ICO) or Social Ventures.
- ICO and Social Ventures: The CPD informs the Employment Manager a referral has been entered into Service Referral Tracker. The Employment Manager assigns an Employment Developer. The Employment Developer contacts the individual and/or family/caregivers to set up an intake meeting at 1216 St. Paul Street. If it is pre-determined that employment is not the desired service direction, the Employment Manager contacts the CLBC liaison to discuss the next steps and notify CPD.
- Home Share: Refer to the Home Sharing Coordination procedure.
- Homes: The CPD sets up a site orientation meeting with the Home's Supervisor and invites the individual and caregiver and/or family member to come to the home. The CPD and a supervisor explain the services and gives them a "Getting to Know You" form.

3. At the intake meeting the CPD:

- Completes the Pathways Application, a Community Support and Consent form and gives the person and family and/or caregivers blank protocols if required.
- If the referral is for employment, the Employment Developer reviews and completes the pre-employment questions and Employment Participation Agreement.
- Gives the individual their Orientation package and reviews it with them.
- Obtains mailing, email and phone information for the caregivers and/or family members involved with the individual.
- Reviews the Orientation checklist with individuals and family/caregivers.
- Takes a picture of the person for their ShareVision site.

4. Upon completion of the intake meeting the CPD:

- Emails the area supervisor or manager and Cc.'s the executive director asking what date the individual can begin service and stating a Discovery may be required.
- Sets up the individual's site on ShareVision (creates New Individual in Contacts and creates a profile), emails the Activity Quality Assurance Manager (AQAM) to manage permissions of profile, uploads the original Referral, Community Support and Consent form, protocols, existing plans, enters the individual's days of service (indicated on the CLBC referral) on the Individual Calendar list in ShareVision.
- Assembles a personal binder according to the Person Served Files and Record of Effects policy which contains all the information from the intake meeting and gives it to the appropriate manager or executive director for review. The manager or executive director gives the binder back to the CPD and the CPD gives the binder to the area supervisor prior to the start date.
- Updates the person's information including the Placement List, ShareVision Service Referral Tracker list, removes attachments and adds the person to the Master Service list.
- Ensures that the individual is included on the newsletter mailing list (in the Profile list in ShareVision).
- Using the Contact Manager creates General Profiles for caregivers and family members involved with the individual.
- Adds "New Relationship" between caregivers and family members to "Contacts" on the individual's ShareVision site.

5. If the CPD:

- Is unable to set up a meeting within a week of receiving the referral due to the person, their family or caregiver not responding, they notifies the CLBC liaison that contact has not been made and seeks direction. The CPD records CLBC's direction in the ShareVision Service Referral Tracker list and emails the area supervisor and executive director.
- Is unable to set up a meeting or does not receive the "Getting to Know You" form they notifies the CLBC liaison and seeks direction. The CPD records CLBC's direction in the ShareVision Service Referral Tracker list and emails the area supervisor and executive director.

6. The CPD, within one working day of receiving the email from the supervisor or manager indicating the start date, phones the person to confirm they can begin service. The CPD emails the leadership team and puts a notice on ShareVision stating the

person will be starting and the date they begin. The CPD updates the Vacancy in the Service Site.

7. The area supervisor or manager thoroughly reviews the content of the individual's ShareVision site with the support workers in the service area.

8. When service begins the person and, if applicable, their primary caregiver comes to the service site and reviews with the supervisor or manager, the individual's binder to ensure Pathways has all the required information to support the person. In addition they bring the following:

To a day site:

- Personal care and personal assistance products/supplies.
- Medications and required documentation to enable staff to administer the medications (MAR sheet).

To a home:

- Identification: SIN Card, BC Medical Card, provincial identification and birth certificate.
- Possessions with itemized list and approximate value of each item over \$100.
- Personal money.
- Personal care and personal assistance products/ supplies.
- One month's supply of medications and the required documentation to enable staff to administer the medications (MAR Sheet).

9. The area supervisor or manager (excluding Home Share):

- Designates a staff and a peer from Pathways to complete the Intake/Orientation Checklist with the person. The completed Intake/Orientation Checklist is uploaded to ShareVision under 'miscellaneous documents' by the supervisor or forwarded to the CPD to be scanned and uploaded to the Individual's ShareVision site by the CPD.

10. The CPD:

- After one month, contacts all stakeholders by telephone to determine their satisfaction with the service. If required or requested, a follow-up meeting is held and tracks the information in the Referral tracker.
- Schedules an initial Individual Service Plan (ISP) for three months after the person's start date.

Referral: Increase, Decrease or Change of Service

1. Person served requesting additional service, a transfer, or services from another area they are not currently attending informs the individual to notify CLBC.

2. Once the referral is received, the CPD completes steps 2 to 10 from the "Referral or Service Request Intake" section and updates the person's information i.e. application, Community Support and Consent form, protocols, existing plans, and the Individual Information list, etc.

ICO (only) Service Opportunities Declined

1. Consistent lateness or three no shows results in job seekers customized employment plan being placed on hold until the Employment Developer, job seeker, and family/caregiver can find out if employment is important to the job seeker.

2. The Employment Manager:

- Contacts CLBC to notify them that the person has not been attending and/or has requested a leave. The Employment Manager then proceeds as directed by CLBC. The Employment Manager notifies CPD.

3. Refer to the Exiting procedure.

Service on Hold (Leave of Absence)

1. Person served wanting a leave of absence lets the supervisor or manager of the area they are attending know. The supervisor informs the CPD via email.

2. The CPD contacts CLBC to notify them that the person has not been attending and/or has requested a leave. The CPD then proceeds as directed by CLBC.

Discontinuation of Service

1. Refer to the Exiting procedure.