

## 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: March 25, 2024

Replaces Procedure Dated: January 29, 2024

#### **New Referral or Service Request**

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

#### **Persons wanting to attend Pathways services with their own support worker and who do not receive services from Pathways**

1. The person or person's supports contacts the CPD.

2. The CPD:

- Googles the person's name to determine if there is information circulated that may be pertinent to serving the person. They notify the executive director if something relevant is discovered.
- Determines if the request is feasible and notifies the person, the person's supports and the area supervisor.

3. The area supervisor:

- Notifies the staff in the service area.
- Tracks the person's attendance.
- If attendance exceeds 10 working days, notifies the finance manager.

4. The finance manager creates a monthly invoice and sends it to the person for payment. See the Entrance, Transfer, Increase, and Discontinuation Policy for the current daily fee.

## **Referral or Service Request Intake**

### **1. The CPD:**

- Googles the person's name, completes a Facebook search and checks the Court Services Online site to determine if there is information circulated that may be pertinent to serving the person. They notify the executive director if something relevant is discovered.
- In consultation with the area supervisor, determines if the person can be served by the agency. If not notify the executive director or designate who takes over managing the placement.
- 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 a tour at the location they have been referred to. The CPD and a supervisor explain the services and discuss the "Getting to Know You" form, blank protocols if required, and schedule of events. If the person is continuing with the intake, they and or their support person(s) are sent a link to complete an online application. If the person is unable to complete the application online, it will be completed at the initial intake meeting. 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 CPD or Employment Developer contacts the individual and/or family/caregivers to set up a pre-employment meeting at 1216 St. Paul Street. If employment is proceeding, CPD or Employment Developer will review the Pre-employment, Employment Agreement, CLBC Periodic Report and Community Support and Consent forms with the individual and/or family. Give a photocopy the Employment Agreement to the individual. A photo will be taken of the individual. A link to complete the online application will be sent via email. If CPD is not at the meeting send the Consent form, photo and Employment agreement to CPD. After the application has been received, CPD will proceed to Step 4 below. When the binder has been assembled an Orientation package and Orientation check list will be completed by the Employment Developer at the first Discovery meeting.

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. If the person is continuing with the intake, they and or their support person(s) are sent a link to complete an online application.

### **3. At the intake meeting the CPD:**

- Reviews the Pathways Application, a Community Support and Consent form and gives the person and family and/or caregivers blank protocols if required.

- Discuss a start date with supervisor. If a supervisor is not in attendance, 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.
- 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.
- When the online application has been received, or done in person, CPD will print a copy and it will go into the binder's intake section. Edits the information for clarity and person centered focus.
- Sets up the individual's site on ShareVision (creates New Individual in Contacts and creates a 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, 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 notify 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 online application or "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.
- If the referral was rescinded, update the Service Referral Tracker in ShareVision and place the referral in a file labeled Rescinded Referrals (year). Give the file to the Executive Director at the end of each year. Follow the Exit Procedure if a binder and ShareVision were set up.

6. 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 Activity Service 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 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 Service 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 step 1 from the "Referral or Service Request Intake" section and updates the person's information i.e. Community Support and Consent form, protocols, existing plans, and the Individual Information list, Individuals calendar, etc.

- Updates the person's information including the Placement List, Master Service list and ShareVision Service Referral Tracker list.

- 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 Activity Service Vacancy in the Service Site.

### **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.