PATHWAYS ABILITIES SOCIETY

PROCEDURE: EXITING SERVICE AREAS OR PATHWAYS
Applies to: All Personnel, Volunteers, Tenants and Persons Served

Original Effective Date: April 28, 2003
Effective Date: July 29, 2024
Replaces Procedure Dated: January 29, 2024

Person Served Leaving a Service Area and Remaining with Pathways
1. The supervisor notifies the Community Placement Developer (CPD) via email that the person is leaving a specific service area.

2. The CPD:
- Sends the person an email with a link to the appropriate Exit Interview form using the Anonymous Forms feature: Exit Interviews for Individuals Who Received Service, asking them to complete the questions and letting them know what the information is used for.
- If the person is not able to complete the exit interview online, they can request a copy be mailed to them. The person and/or their family or caregiver can request a formal, in-person exit interview with a management representative.
- Updates and edits the Individual Calendar list on ShareVision.
- Updates and edits the Placement List if necessary.
- Updates and edits the Master Service list.

3. The chair of the Leadership Meeting:
- Reads the completed Exit Interviews on ShareVision at the leadership meeting to determine if follow-up and/or quality assurance changes are required.
- Documents in the minutes of the meeting any follow-up required.

4. The Activity Quality Assurance Manager (AQAM):
- Implements any follow-up required from the quality assurance recommendations that were discussed at the leadership meeting.
- Tracks the implementation of the recommendations in the leadership meeting minutes.

5. When requested, the executive director provides the Board of Directors access to the completed forms.

Person Served Leaving Pathways Discontinuing Service
1. Person served, their family, advocate, or CLBC provide 30 days' notice.

2. The person receiving the notice informs the area supervisor and CPD by email of the last day of attendance.

3. The CPD:
- Sends the person an email with a link to the appropriate Exit Interview form using the Anonymous Forms feature: Exit Interviews for Individuals Who Received

Service, asking them to complete the questions and letting them know what the information is used for.

- If the person is not able to complete the exit interview online, they can request a copy be mailed to them. The person and/or their family or caregiver can request a formal, in person exit interview with a management representative.
- Informs CLBC by email at the end of each month, and Cc.'s the Executive Director, that an individual is leaving services, the area and days of week they have been attending and the level of support needs.
- Obtains the person's binder and any other documents or correspondence from the supervisor the last day the person attends. They gather the person's information and confirms all documentation has been uploaded to the M drive. Once completed, unless specified, the information is shredded.
- Edits the Individual Calendar list on ShareVision.
- Moves the person's name from the Master Service list to the Exited Services sheet in the Master Service List Excel spreadsheet and enters the last day attended in the End Date column.
- Edits and updates the Placement List.

4. The area supervisor completes an Exit Summary and completes the individual's goals.

5. The CPD:
- Changes the individual's ISP to Previous.
- Changes Caregivers and family to inactive if no longer involved in Pathways.
- Removes the relationship between the individuals and the contacts in ShareVision Contact Manager. Removes Email, Mailing and Handouts lists.
- Delete attachments: protocols, referrals, miscellaneous documents, Getting to Know You, photos in the photo library, individual information page and individual contact page, application and all employment, home share and the homes service documents in individual's pages in ShareVision.
- Changes the individual status from Active to Exited Services, Deceased or specify your own value on the individual's Information page.
- Change program history in the ShareVision CPD page and enter the exit date and reason for departure.
- Create a folder out of the person's binder with the person's name and exit date and gives the content to the executive director for filing.

6. The chair of the Leadership Meeting:
- Reads the completed Exit Interviews on ShareVision at the leadership meeting to determine if follow-up and/or quality assurance changes are required.
- Documents in the minutes of the meeting any follow-up required.

7. The Activity Quality Assurance Manager (AQAM):
- Implements any follow-up required from the quality assurance recommendations that were discussed at the leadership meeting.
- Tracks the implementation of the recommendations in the leadership meeting minutes.

8. When requested, the executive director provides the Board of Directors access to the completed forms.

9. If requested, representatives of the society assist the individual to adjust to their new home or service site.

10. The area supervisor or, in the case of a home share or respite provider, the Home Share Manager prepares and provides the person with the following:
From day sites:
- Medications.
- Appropriate file information.
- Any items they may have at the service site.

From a home:
- The following procedure is explained to the person served and/or their representative by the home's supervisor or designate.
- The Transition Plan ShareVision list is completed, which accounts for the following:
- The individual's clothing and possessions.
- The original and current personal belongings list, ensuring that all belongings are accounted for in the move.
- Medications.
- Identification.
- Funds and how they will be transferred to the new home with the individual.
- Appropriate file information.

11. The Executive Director ensures that all information about the person is stored in a secured area for a minimum of ten years.

12. If an individual dies, their personal items will be released to their legal guardian or CLBC.

13. The CPD:
- Sixty days after the individual's last day of service, contacts the individual and/or their caregiver by telephone to enquire how the transition is progressing and whether the individual requires Pathways to do anything on their behalf.
- Documents the discussion in the Exit Summary "Results of the 60-day Follow-up" field and communicates actions required to the appropriate personnel.

Person Served (employee) Leaving Pathways Employment

1. The area manager or supervisor notifies the Finance Manager, Executive Director and CPD via email.

2. The area manager or supervisor gives the Executive Director the person's employee file.

3. The Executive Director or designate starts an Employee/Volunteer Departure Checklist in ShareVision and notifies the Finance Manager.

4. The Finance Manager:
- Notifies the Executive Director once they have completed their portion of the Employee/Volunteer Departure Checklist in ShareVision.
- Sends the employee their Record of Employment (ROE) and final pay stub and

concludes the employee's PayWorks information.
- Sends the employee an email with a link to the appropriate Exit Interview form using the Anonymous Forms feature: Exit Interviews – Employees and Volunteers (1) or (2), asking them to complete the questions.

5. The chair of the Leadership Meeting:
- Reads the completed Exit Interviews on ShareVision at the leadership meeting to determine if follow-up and/or quality assurance changes are required.
- Documents in the minutes of the meeting any follow-up required.

6. The Activity Quality Assurance Manager (AQAM):
- Implements any follow-up required from the quality assurance recommendations that were discussed at the leadership meeting.
- Tracks the implementation of the recommendations in the leadership meeting minutes.

7. When requested, the executive director provides the Board of Directors access to the completed forms.

8. The Executive Director:
- Places the employee file in the old employee file cabinet.
- Deactivates the person's Employee Files Person's with Diverse-abilities ShareVision list.

Employees Leaving Pathways

1. The People and Culture Manager or designate start an Employee/Volunteer Departure Checklist in ShareVision and notifies the Finance Manager and Executive Director.

2. The People and Culture Manager:
- Completes the portion of the Employee/Volunteer Departure Checklist they are responsible for.
- Consolidates the employee's 4 files (employee (2 files current and old), benefits and medical into one file) and gives the file to the Executive Director.

3. The Finance Manager:
- Notifies the Executive Director once they have completed their portion of the Employee/Volunteer Departure Checklist in ShareVision.
- Sends the employee their Record of Employment (ROE), final pay stub and concludes the employee's PayWorks information.
- Sends the employee an email with a link to the appropriate Exit Interview form using the Anonymous Forms feature: Exit Interviews – Employees and Volunteers (1) or (2), asking them to complete the questions. The employee can request a formal, in-person exit interview with a management representative. If the departure relates to a grievance, relevant management personnel and/or union representation may be requested to attend.

4. The Executive Director:
- Consolidates the employee's 4 files (employee (2 files current and old), benefits and medical into one file) and places the file in the old employee file cabinet.
- Concludes the Employee/Volunteer Departure Checklist.
- Deactivates the person's Employee Information ShareVision list.

5. The chair of the Leadership Meeting:
- Reads the completed Exit Interviews on ShareVision at the leadership meeting to determine if follow-up and/or quality assurance changes are required.
- Documents in the minutes of the meeting any follow-up required.

6. The Activity Quality Assurance Manager (AQAM):
- Implements any follow-up required from the quality assurance recommendations that were discussed at the leadership meeting.
- Tracks the implementation of the recommendations in the leadership meeting minutes.

7. When requested, the executive director provides the Board of Directors access to the completed forms.

Volunteer and Practicum Students Leaving Pathways

1. The volunteer's supervisor notifies the Employment Manager that the volunteer is leaving.

2. The Employment Manager:
- Completes an Employee/Volunteer Departure Checklist in ShareVision.
- Sends the volunteer an email with a link to the appropriate Exit Interview form using the Anonymous Forms feature: Exit Interviews – Employees and Volunteers (1) or (2), asking them to complete the questions. The volunteer can request a formal, in-person exit interview with a management representative.
- Deactivates the person's Agency Volunteer Information ShareVision list.
- Consolidates the volunteer's file and sends it to the executive director for filing the old employee file cabinet.

3. The chair of the Leadership Meeting:
- Reads the completed Exit Interviews on ShareVision at the leadership meeting to determine if follow-up and/or quality assurance changes are required.
- Documents in the minutes of the meeting any follow-up required.

4. The Activity Quality Assurance Manager (AQAM):
- Implements any follow-up required from the quality assurance recommendations that were discussed at the leadership meeting.
- Tracks the implementation of the recommendations in the leadership meeting minutes.

5. When requested, the executive director provides the Board of Directors access to the completed forms.

Home Share and Respite Contractors Discontinuing with Pathways

1. The Home Share Manager:
- Completes the Transition Plan list on ShareVision for the supported individual.
- Consolidates the home share provider's files and binders and gives them to the Executive Director for filing.
- Deactivates the Home Share provider's ShareVision account.
- Sends the home share provider the link to the Anonymous form called "Exit Interview – Home Share Providers"
- Updates the Home Share Contractors list in ShareVision, changing the Home Share Provider's status to "inactive."

- Updates the “Revenue Home Share” spreadsheet removing the contractor’s name.
- Fills out and concludes the Home Share Contractor Departure list in ShareVision.
- Confirms with CPD Intake that the Home Share Contractor has been removed from the Contact Manager list in ShareVision.

2. The chair of the Leadership Meeting:
- Reads the completed Exit Interviews on ShareVision at the leadership meeting to determine if follow-up and/or quality assurance changes are required.
- Documents in the minutes of the meeting any follow-up required.

3. The Activity Quality Assurance Manager (AQAM):
- Implements any follow-up required from the quality assurance recommendations that were discussed at the leadership meeting.
- Tracks the implementation of the recommendations in the leadership meeting minutes.

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Tenants (voluntary) Leaving

1. Tenants give at least one month's clear notice to the Building Mmanager of their intention to move out of their unit on the last day of the month preceding the last month they intend to live in the unit in writing or via email.

2. The Building Manager:
- Notifies the Executive Director and Finance Manager.
- Refers to and completes Unit Inspection policy and procedure.
- Sends the tenant an email with the Move Out Procedure attached and a link to the appropriate Anonymous Form for Tenant Exit Interviews, asking them to complete it. The tenant can request a formal, in-person exit interview.
- Gives the tenant's paper file to the Executive Director for annual filing.

3. The chair of the Leadership Meeting:
- Reads the completed Exit Interviews on ShareVision at the leadership meeting to determine if follow-up and/or quality assurance changes are required.
- Documents in the minutes of the meeting any follow-up required.

4. The Activity Quality Assurance Manager (AQAM):
- Implements any follow-up required from the quality assurance recommendations that were discussed at the leadership meeting.
- Tracks the implementation of the recommendations in the leadership meeting minutes.

5. When requested, the executive director provides the Board of Directors access to the completed forms.

Tenants (not voluntary) Leaving

1. The Building Manager:
- Refers to the relevant procedures and notifies the Executive Director and Finance Manager.
- Upon receiving written notice of ending the tenancy, sends the tenant an email with a link to the appropriate Anonymous Form for Tenant Exit Interviews, asking them to

complete it before handing over keys and vacating the apartment. The tenant can request a formal, in-person exit interview.
- Gives the tenant’s paper file and emails the digital file to the Executive Director for annual filing.

2. The chair of the Leadership Meeting:
- Reads the completed Exit Interviews on ShareVision at the leadership meeting to determine if follow-up and/or quality assurance changes are required.
- Documents in the minutes of the meeting any follow-up required.

3. The Activity Quality Assurance Manager (AQAM):
- Implements any follow-up required from the quality assurance recommendations that were discussed at the leadership meeting.
- Tracks the implementation of the recommendations in the leadership meeting minutes.

4. When requested, the executive director provides the Board of Directors access to the completed forms.