

PATHWAYS ABILITIES SOCIETY

PROCEDURE: HOME SHARE ADMINISTRATION

Applies to: All Personnel

Original Effective Date: January 18, 2021

Effective Date: June 4, 2026

Replaces Procedure Dated: December 2, 2024

Home Share Caseload Review

Home Share Coordinators meet monthly with the Associate Executive Director to review their caseloads and discuss any current and outstanding work to be completed. The agenda is documented on the agency server in Management > Home Share > Team Meetings – Home Share > Current Year.

Home Share Provider Files

Three active files are kept for home share providers: A primary file maintained digitally, a secondary binder maintained and stored in locked cabinets, and a third file which consists of the original signed contracts (stored in a filing cabinet in the Finance Manager's office). Home Share Providers' information is also documented in the ShareVision database.

Home Share Coordinators review Home Share Providers' files (digital files, binders, and contracts) annually in January. Any expired or outdated documents are removed from the binder, saved in the "Old" folder in their digital file, and the paper copy is shredded.

Home share contracts that are expired or discontinued are given to the Executive Director for filing (original copies are kept for ten years).

The Home Share Coordinator is responsible for filing all documents according to the procedure below as they are received.

Files contain the following:

- >Expires and renewed upon expiry. Paper copy is shredded upon expiry.
- *Updated annually in January/February

1. Primary File:

On the agency server, Management > Home Share > Home Share Providers Active > Applicable Home Share Coordinator:

Application Folder:

- Application (documented in ShareVision starting in August 2024)
- References
- Physician's Declaration
- Home Study Notes
- Home Study Recommendation
- Health and Safety Checklist
- Home Share Provider Orientation

Contract Folder:

- Contract

- Contract Amendments (if applicable)
- Signed Confidentiality Agreement *
- Signed Conflict of Interest *
- Signed Home Share Provider Expectations*
- Old Information folder

Miscellaneous Folder:

- Medication Administration Audit >
- Home Share Individual's Financial Management Agreement
- Individual and Family Wellness & Extra Funding Reconciliation Forms
- Banking Information for Home Share Provider (ie. direct deposit or void cheque)

Monitoring Folder:

- Current year's Monitoring Forms
- Financial Monitoring documentation (if applicable)
- Old Monitoring folder

Quality of Life Reports (documented on ShareVision starting in September 2024)

- Old Quality of Life Reports folder

Requirements Folder:

- Criminal record clearance letter >
- First Aid >
- Food Safety certificate
- Driver's Abstract >
- Driver's License >
- Home Insurance – individual's possessions covered >
- Vehicle Insurance - \$3,000,000 third party liability >
- CLBC Privacy and Information Management Course certificate
- Abuse Prevention Training certificate
- MANDT Training certificate (must be renewed annually if they are supporting an individual with a Behavioural Plan)
- Old Information folder

2. Secondary File:

A binder containing the same structure as the digital file. Paper originals are stored in the binder and shredded upon expiry, after they have been saved in the electronic file.

Documents that are received digitally, as outlined above, will not be printed and placed in the binder.

3. Signed Contract File:

The paper copy of each home share contract is kept in the office of the Finance Manager.

Expired or terminated contracts are obtained by the Executive Director and retained for ten years.

ShareVision Files

The ShareVision list "Home Share Contractors" contains a list of all home share providers that are currently contracting with Pathways. Each individual contractor has an information sheet that includes their personal information, the individual(s) living with them, their requirements and expiry dates, information on respite providers, and other pertinent information. This list is updated by the Home Share Coordinator as information is received.