

PATHWAYS ABILITIES SOCIETY

PROCEDURE: HOME SHARE COORDINATION

Applies to: All Personnel, Home Share Contractors, Coordinators, and Managers

Original Effective Date: January 18, 2021

Effective Date: July 24, 2026

Replaces Procedure Dated: December 3, 2025

Assisting Individuals to Find Home Share

1. Individuals are referred for home share services as outlined in the Entrance, Transfer, Increase, and Discontinuation of Service policy and procedure.
2. If the home share referral has not been received, the Home Share Coordinator notifies the individual's family/caregiver to contact their CLBC Facilitator and have a referral sent to Pathways. Once the home share referral is received, families and/or individuals seeking home share meet with the Home Share Coordinator to determine needs in order to match them with an appropriate Home Share Provider.
3. The Home Share Profile for Individual form is completed at the initial meeting. Additional meetings with the individual and family may be required to complete the home share profile for the individual.
4. Once the Home Share Profile is complete, the Home Share Coordinator creates an Anonymous Profile of the individual, based on the information that was collected. The Anonymous Profile is then sent to any home share providers who may be a good match. The Home Share Coordinator may reach out to the individual and their family or support network to discuss these options beforehand.
5. Once a potential suitable Home Share Provider is found, a meeting is arranged between the individual, their family or support network, the Home Share Coordinator, and the potential Home Share Provider. This initial meeting takes place at a neutral location. If there is a strict timeline and both parties are comfortable, the initial meeting may occur at the potential Home Share Provider's house.
6. If the initial meeting goes well, the Home Share Coordinator arranges a second meeting at the Home Share Provider's home. The individual and their family or support persons attend. If it is determined that the match is not suitable, another potential Home Share Provider is contacted.
7. If the home visit goes well, a respite visit is strongly encouraged. The individual's current Home Share Provider is expected to pay for this respite using their Individual and Family Wellness funding. If the individual is not currently living with a Home Share Provider, the Pathways Home Share Coordinator contacts their CLBC liaison to confirm whether there is funding in place for respite. If no funding is available, individuals will still go for respite and the agency absorbs the cost. If it is determined after respite that the

match is unsuitable, another potential Home Share Provider is contacted.

8. Steps 4 through 6 are repeated until a suitable match is found, or it is determined that Pathways does not have any potential approved Home Share Providers.

9. If there are no other potential Home Share Providers available, the Home Share Coordinator:

- Informs the individual and their family that Pathways does not have any potential Home Share Providers and advises them to contact their CLBC Facilitator.
- Informs the individual's CLBC Facilitator and CLBC Analyst that Pathways is not able to find a suitable match and asks that the referral be rescinded.
- Advises the Community Placement Developer (CPD) that the referral has been rescinded.

10. If it is determined that the match is suitable, the Home Share Coordinator:

- Coordinates a move-in date. The individual's current Home Share Provider, family member, or support person is responsible for helping the individual move their belongings.
- Notifies the CPD of the date that the individual will be moving.
- Coordinates a transition meeting and uses the ShareVision form "Home Share Transition Plan" as a guideline to ensure all aspects of the transition are considered. If the individual is not already receiving services from Pathways, an intake meeting can also be completed by the CPD at the same time as the transition meeting. The individual or their support person(s) are sent a link to complete the ShareVision Individual's Information list online, prior to the transition/intake meeting. If the individual is unable to complete the form online, it will be completed at the initial intake meeting.
- Fills out the form "Ministry Consent to Disclosure of Information" and gets the individual to sign the form.

If the individual is under the age of 27 and assigned a SAJE (Strengthening Abilities and Journeys of Empowerment) guide or navigator:

**young adults who transitioned out of a provincially recognized child or youth care arrangement post April 2024 are eligible for SAJE*

- Contact the SAJE worker or SAJE general inquiry line at 1-866-623-3001 and have them update Ministry Shelter Information Form and Direct Deposit Application.
- Obtains a void cheque or direct deposit form from the Home Share Provider if they are new to Pathways and gives a copy to the Finance Manager for payroll.

If the individual is under 65 years old and not linked with a SAJE guide or navigator, the Home Share Coordination Manager:

- Fills out the "Ministry Shelter Information Form" and gets the new home share provider to sign it.
- Obtains a void cheque or direct deposit form from the Home Share Provider if they are new to Pathways and gives a copy to the Finance Manager for payroll.
- If the new Home Share Provider is not already signed up for direct deposit with the Ministry and the individual would like their room and board payments to go directly to the Home Share Provider, the Home Share Provider will need to complete the "Ministry Direct Deposit Application" form with their signature.

-If the individual is moving on to First Nations reserve land and are not Westbank First Nations members, they must acquire a letter from Westbank First Nations stating they are not eligible for financial support from the band. They are to go to the Community Service building at 1900 Quail Lane in Westbank with ID and proof of their new address to acquire said letter.

- Faxes the individual's updated Ministry Consent to Disclosure of Information and Service Authorization Form (HR3189A) to the Advocate Client Enquiry Line at 1-855-771-8704

- Faxes the following forms to the Ministry of Social Development and Poverty Reduction at 1-855-771-8741: the completed Shelter Information Form (HR3037), the Direct Deposit Application (FIN 312) and a void cheque or direct deposit form from the Home Share Provider's bank with the same address as the one listed on the Shelter Information Form. The letter from Westbank First Nations can also be sent with this package, if applicable. These forms can be requested from the Ministry contact or can be found in the M: drive>Management>Forms>Pathways Forms>H>Home Share Forms>Ministry Forms.

- The following business day, email the Ministry at SDSI.AdvocateClientEnquiries@gov.bc.ca using the following template, to request a call back to confirm that the forms were received and processed. Do not include any personal information about the individual in this email.

Template for email:

ADVOCATE NAME:

AGENCY/SOCIETY/RELATION TO CLIENT:

BEST TIME FOR CALLBACK:

TELEPHONE NUMBER (INCLUDING LOCAL/EXTENSION):

NUMBER OF CLIENTS:

- Wait for a call back. When they call back, ask if they have processed the forms that were sent over, and have the person confirm the changes were made.

If the individual is over 65 years old: The Home Share Coordinator instructs the new Home Share Provider to go to the Service Canada Kelowna Office with the individual they will support to set up banking information and direct deposit payments.

11. Shelter (Room & Board) Costs

- Shelter costs follow an individual to the night. When an individual moves out of a home share, the Home Share Coordinator confirms whether the individual has paid their full month's shelter payment to the previous Home Share Provider and whether funds will need to be returned.

- If possible, the Home Share Coordinator will remind the previous Home Share Provider that funds will need to be paid back to the individual either immediately or at an agreed upon date in the future. A note is made on ShareVision> Home Share> Home Share Coordinator Notes and Site Visits documenting what method has been agreed upon.

- If funds are not able to be returned and an individual is under the age of 65, the Home Share Coordinator contacts the Ministry of Social Development and Poverty Reduction contact found on ShareVision> Contractors for Building and Equipment Maintenance list and requests emergency shelter funding for the month. Note: an updated Ministry Consent to Disclosure form may need to be faxed in before this request can be processed. These forms can be requested from the Ministry contact or can be found in the M:

drive>Management>Forms>Pathways Forms>H>Home Share Forms>Ministry Forms.

11. The Home Share Coordinator:

- Instructs the Home Share Provider and the individual to create a list of possessions and forwards the list to the Home Share Coordinator.
- Completes the steps in the Home Share Payments and Funding Guide Templates Procedure-
- Prepares the contract and gives it to the Home Share Provider for signature, then has it signed by the Home Share Coordinator and the Executive Director or Associate Executive Director. A copy of the contract is given to the Home Share Provider, and the original is filed with the finance department.
- Updates the Home Share Contractors list in ShareVision.
- Creates a binder for the Home Share Provider (if they do not already have one) and files all documents accordingly.
- Creates a second binder to give to the Home Share Provider which contains the individual's Home Share Care Plan, Individual's Information, any protocols, medication information, Home Share Individual Medical Appointment Records form, Home Share Individual Spending Form, and any other relevant information.
- Moves the Home Share Provider's digital file into the M: Drive > Management > Home Share > Home Share Providers Active > (Home Share Coordinator's folder).
- After the individual moves into the home, the Home Share Coordinator schedules informal check-ins with the Home Share Provider and the supported individual one week, two weeks, and one month post move-in date. The one-week and two-week check-ins with the individual are documented in their Notables in ShareVision, and the one-week and two-week check-ins with the Home Share Provider are documented in the "Home Share Coordinator Notes and Site Visits" list in ShareVision. The one-month check-in is completed in conjunction with a monitoring visit.

Individual Changing Home Share Providers

1. When a supported individual wants to move to another home share arrangement the individual is encouraged to contact their CLBC Facilitator to inform them.

2. The Home Share Coordinator emails the CLBC Facilitator and Analyst that the individual would like to move.

3. The CLBC Facilitator and Analyst will advise the Home Share Coordinator on how to proceed. If the individual wishes for Pathways to locate another Home Share Provider, then the "Assisting Individuals to Find Home Share" section of this procedure will be followed. If the individual wishes for another agency to locate a home share situation, then the Home Share Coordinator follows the "Individual Transitioning from Pathways Home Share" procedure below.

Individual Transitioning from Pathways Home Share

1. The Home Share Coordinator:

- Coordinates a transition meeting and uses the ShareVision form "Home Share Transition Plan" as a guideline to ensure all aspects of the transition are considered.
- Checks with the individual and their family to ensure the individual has support with moving their possessions to the new home.
- Completes the steps in the Home Share Payments and Funding Guide Templates

procedure.

- Notifies the CPD of the exit so that the “Exiting Pathways Procedure” can be followed.
- Updates the Home Share Contractors list in ShareVision.
- Completes responsibilities in the “Exiting Pathways Procedure.”

Individuals Turning 65

When an individual in home share turns 65, they are no longer eligible to receive PWD (Persons with Disability) funding and they become eligible to receive Old Age Security (OAS) or Guaranteed Income Supplement (GIS). This will come into effect the month after the individual’s 65th birthday. Individuals typically receive a letter from the Ministry of Social Development and Poverty Reduction on their 64th birthday, prompting them to apply for OAS and GIS.

1. At least three months before an individual in home share turns 65, the Home Share Coordinator:

- Notifies the individual and their Home Share Provider that they will no longer receive PWD funding when they turn 65, and that they will begin receiving OAS and GIS.
- Notifies the Home Share Provider that they will begin receiving less money for their home share rate, but that the individual’s room and board will increase from \$841.13 per month to \$1,005.80 per month. Overall, the total amount that they receive will remain the same.
- Notifies the individual that they will need to set up monthly direct payments to their Home Share Provider for room and board, as Service Canada does not set up direct deposits for Home Share Providers.
- Revises the Home Share Revenue spreadsheet to indicate that the individual is over 65 and changes the “Monthly Provider Fees per Funding Guide” column to the new rate, according to the most recent CLBC Home Sharing Rate Table. The “Total Monthly HSP Payment” column should automatically re-populate.

Emergency Placements

If a situation arises that a person needs to move immediately, the Home Share Coordinator refers to the Home Share Emergency procedure.

Contract Termination

1. If Pathways terminates a contract due to a provision outlined in the contract, a letter terminating the contract is sent via email and/or Canada Post outlining contract provision violations.
2. If the Contractor serves notice on their contract; a confirmation e-mail is sent which includes the date that the notice was given.
3. The Home Share Coordinator contacts the individual and asks them if they would like to continue living with their Home Share Provider (as long as there are no health or safety concerns), or if they would like to remain with Pathways and move into a new home share. If the individual decides they would like to move, follow the Home Share Emergency procedure if no transition plans are in place and the timeline desired does not allow for a coordinated move as outlined above.

4. The Home Share Coordinator completes responsibilities in the “Exiting Pathways Procedure.”

Home Studies for Microboards/Person-Centered Societies

1. A microboard or person-centered society contacts Pathways, requesting that a home study be conducted.
2. All time spent to conduct the home study, including communications, collecting requirements, and any other processes are tracked in the Excel spreadsheet, located in the M: Drive > Management > Home Share > Home Studies for Microboards > Home Studies for Microboards PCS Tracking.
3. Pathways conducts the home study as per Steps 2 to 5 of the Home Sharing Application procedure. Once the home study recommendation is complete, it is sent to the microboard or person-centered society. If Pathways deems that the home share provider should not be approved, the Home Share Coordinator contacts the CLBC Analyst via email stating the concerns and awaits further instructions.
4. The Home Share Coordinator prepares an invoice using the template located in the M: Drive > Management > Forms > Pathways Forms > H > Home Share Forms > CLBC Policies and forms > Home Study Invoice Template. The Home Share Coordinator prints the prepared invoice on a Pathways letterhead, scans it, and sends it to the microboard or person-centered society, requesting that payment be made to Pathways via electronic funds transfer to fm@pathwayskelowna.ca.
5. The microboard or person-centered society then issues payment directly to Pathways.