

PATHWAYS ABILITIES SOCIETY

PROCEDURE: HOME SHARING COORDINATION

Applies to: All Personnel

Effective/Revision Date:

January 18, 2021

Assisting Individuals to Find Home Share

1. Families and/or individuals with home sharing contracts are referred for service as outlined in the Entrance, Transfer, Increase and Discontinuation of Service policy and procedure.
2. Families and/or individuals seeking home share meet with the Home Share Manager to determine needs in order to match them with an appropriate Home Share Provider. The Home Share Profile for Individual is started at the initial meeting. Additional meetings with the individual and family may be required to complete the Home Share profile for the individual.
3. Once a potential suitable Home Share Provider is found, a meeting is arranged between the individual, their family, the Home Share Manager and potential Home Share Provider. The individual may invite their CLBC Facilitator or other people in their support network. 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.
4. If the initial meeting goes well, the Home Share Manager arranges a second meeting at the Home Share Provider's home. The individual and their family or support persons attend. If it is determined the match is not suitable, another potential Home Share Provider is contacted.
5. If the home visit goes well, a respite visit is strongly encouraged. The Pathways Home Share Coordinator contacts their CLBC liaison to confirm there is funding in place for respite. If it is determined the match is not suitable, another potential Home Share Provider is contacted.
6. Steps 3 through 5 are repeated until a suitable match is found, or it is determined that Pathways does not have any potential approved Home Share Providers.
7. If there are no other potential Home Share Providers available the Home Share Manager:
 - 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Facilitator and CLBC Liaison Analyst that Pathways is not able to find a suitable match and asks that the referral be rescinded.
 - Advises the Community Placement Developer – Intake that the referral has been rescinded.

8. If it is determined that the match is suitable, the Home Share Manager:
- Coordinates a move-in date.
 - Coordinates a transition meeting and using the form “Transition Plan Home Share” as a guideline to ensure all aspects of the transition are considered.
 - Fills out the form “Ministry Consent to Disclosure of Information” and gets the individual to sign the form.
 - **If the individual is under 65 years old:** Fills out the “Ministry Shelter Information Form” and gets the new home share provider to sign it.
 - 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, attach a direct deposit form from their bank or a voided cheque, and mail to the Ministry of Social Development and Poverty Reduction (address on Page 3 of the form). They can also drop off this form at the local office in Kelowna: 130-1640 Dilworth Drive, Kelowna, BC, V1Y 7V3.
 - Contacts the Ministry of Social Development (currently as of the date of the procedure Nancy.Bussiere@gov.bc.ca) and informs them that the individual is moving (this e-mail will include the individual’s name, the name of the new Home Share Provider, and their full address). This e-mail includes attached the signed “Consent to Disclosure of Information”, the “Shelter Information Form” and a voided cheque or direct deposit form from the home share provider, if applicable.
 - **If the individual is over 65 years old:** The Home Share Manager instructs the new Home Share Provider to go to the Service Canada Kelowna Office with the individual they will be supporting to set up banking information and direct deposit payments.
 - Checks with the individual and their family to ensure the individual has support with moving their possessions to the new home.
 - Instructs the Home Share Provider and the individual to create a list of possessions and to forward the list to the Home Share Manager.
 - Discusses the homeowner’s insurance and establish whether the individual will need to have extra tenants insurance.
 - Notifies the CLBC Liaison Analyst so that the Home Share Funding Guide Template can be amended and sent to the Executive Director.
 - Reviews the amended Home Share Funding Guide Templates to ensure the agreed funding is in place.
 - Notifies the Community Placement Developer-Intake (CPD-intake) of the match so the individual can be scheduled for intake, or if already in Pathways services, the Individual’s Profile and Individual Information Sheet on ShareVision can be amended.
 - Prepares the contract and gives it to the Home Share Provider for signature and forwards it to the Home Share Manager or Executive Director who are an authorized signatory. 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.
 - Gives the Home Share Provider’s banking information (direct deposit form or blank cheque) to the Finance Manager so that direct payments can be made.
 - Updates the “Revenue Home Share” spreadsheet with contract information.

9. Once the contract is completed and signed the Home Share Manager:
- Provides a copy to the home share provider
 - Works with the individual, their family and CLBC Facilitator and the new Home Share Provider to arrange the move.

Application to Provide Home Share

1. The Home Share Manager:

- Enters any communications with persons interested in contracting home share services into the ShareVision list Home Share Provider Applicants and Enquiries.
- Discusses home sharing services, Pathways requirements for home share, the application form, and the Community Living BC Standards for Home Share with the interested party and answers any questions.
- Gives the person desiring to provide home share services the "Application Package Home Share" to complete and submit to the Home Share Manager.
- Makes the decision whether or not to proceed with a home study. If the decision is not to proceed with a home study, the applicant is notified.

2. The Home Share Manager meets with the applicant and:

- Once more reviews the "Requirements and Expectations" document.
- Asks the applicant to complete "Consent for Criminal Record Check" form. If the applicant has completed a criminal record check through the Ministry of Public Safety and Solicitor General (NOT the RCMP) with another agency within the last five years, the "Sharing" form can be completed.
- Asks to see their Driver's Licence. Takes a picture or photocopy for the file.
- Asks to see their vehicle insurance which includes having \$3 million third party liability and takes a picture or photocopy for the file.
- Gives the applicant the information regarding obtaining a driver's abstract and asks that the abstract be emailed directly to the Home Share Manager.
- Reviews the contact information for references. Two positive references are required: one professional and one volunteer. If they do not have a volunteer reference then two professional references must be submitted.
- Gives the applicant the "Physician's Declaration of Good Physical and Mental Health" form to have completed and returned.
- Asks for their first aid certificate, Food Safety course certificate and MANDT or NVCI certificate. If the applicant does not have this certification suggests where they can take the courses, and mention that MANDT training is offered by Pathways.
- Lets the applicant know that when the references have been checked, the criminal record review and drivers abstract have been received, and the "Physician's Declaration of Good Physical and Mental Health" completed then the decision whether to proceed with the home study will be made.
- If the Home Share Manager decides not to proceed with the home study process the applicant is informed.

3. The Home Share Manager conducts home study interviews guided by the suggested questions in the "Home Study Questions" document and the "Home Study Health and Safety Checklist". The home study process may end at any time if the Home Share Manager feels the applicant is not suitable for approval. If this is the case the applicant is notified.

4. When the home study is complete a “Home Study Recommendation” is completed and submitted to the Executive Director for review. A recommendation to approve upon receipt of required documentation can be made. If the recommendation is to not approve, the applicant is notified.

5. After the required documentation is received and in place, the applicant becomes an approved home share provider.

6. The Home Share Manager:

- Completes the “Orientation Checklist- Home Share” with the Home Share Provider.
- Creates the Home Share Provider’s file on the agency server Management>Home Share> Approved Home Share Providers – not currently active (see Home Share Policy).
- Creates the Home Share Provider’s record on the ShareVision List “Home Share Contractors” and files them as inactive until they are matched with an individual.
- Creates a binder containing the same structure as the digital file. Paper originals are stored in the binder (see Home Share Policy).

Application to Provide Home Share: Applicant Contracting Directly with CLBC

1. The applicant is informed that the individual and their family make the decision of which agency the home share contract is administered by. The Home Share Provider asks that the individual and/or their family contact the Home Share Manager to confirm that they want Pathways to administer the home share contract. After this confirmation is received the application will proceed.

2. The Home Share Manager:

- Enters any communications with persons interested in contracting home share services into the ShareVision list “Home Share Provider Applications.”
- Meets with the applicant in their home, discusses Pathways’ home sharing services, Pathways requirements for home share, and informs them of the need of a reference from the CLBC Analyst that they are currently contracting with. This reference is obtained using the form “Reference CLBC or Coordinating Agency” and requires the applicant’s consent. The Home Share Manager answers any questions.
- Makes the decision whether or not to proceed with a modified home study. If the decision is not to proceed with a home study the applicant is notified.
- Contacts the CLBC Analyst that is responsible for the applicant’s contracts and the Pathway’s appointed CLBC Analyst to report that the contractor is applying with Pathways.

3. The applicant requests that CLBC transfer their file to Pathways. The home study does not proceed until the file is received.

4. Upon receiving the file from CLBC the Home Share Manager:

- Contacts the applicant to request any requirements that are missing or outdated, specifically: Criminal Records Review, First Aid and CPR, Food Safety certificate, driver’s abstract, proof of \$3,000,000 third party liability on vehicle insurance, a “Physician’s Declaration of Good Physical and Mental Health.” If the original CLBC home study with references are not part of the transferred information, the applicant is asked to submit three references. One of the three references will be the reference

obtained from the CLBC Analyst in Step 1 above.

- Conducts a home study. If the original home study was transferred with the file then the interviews are guided by the questions in the “Modified Home Study Notes” document. If the original home study was not transferred then home study interviews are guided by the suggested questions in the “Home Study Questions” document. The “Home Study Health and Safety Checklist” is completed. The home study process may end at any time if the Home Share Manager feels that the applicant is not suitable for approval. If this is the case the applicant is notified.

5. When the home study is complete a “Home Study Recommendation” is completed and submitted to the Executive Director for review. A recommendation to approve upon receipt of required documentation can be made. If the recommendation is to not approve, the applicant is notified.

6. After the required documentation is received and in place, the applicant becomes an approved home share provider.

7. Complete Step 6 in **Application to Provide Home Share** above.

Application to Provide Home Share – Applicant Providing Home Share Services through another Agency

1. The Home Share Manager enters any communications with persons interested in contracting home share services into the ShareVision list “Home Share Provider Applications”.

2. The applicant is informed that the individual and their family make the decision of which agency the home share contract is administered by. The Home Share Provider asks that the individual and/or their family contact the Home Share Manager to confirm that they want Pathways to administer the home share contract. After this confirmation is received the application will proceed.

3. The Home Share Manager:

- Speaks with the applicant and discusses Pathways’ home sharing services, Pathways’ requirements for home share and informs them of the need of a reference from the agency they are currently contracting with. This reference is obtained using the form “Reference CLBC or Coordinating Agency” and requires the applicant’s consent. The Home Share Manager answers any questions.

-Makes the decision whether or not to proceed with the application. If the decision is not to proceed with the application the applicant is notified.

- Contacts Pathways’ appointed CLBC Analyst to report the contractor is applying with Pathways.

-Contacts the Agency that the applicant is currently contracting with and requests that they complete the form “Home Share Provider Reference CLBC or Coordinating Agency”.

- Makes the decision whether or not to proceed with a modified home study. If the decision is not to proceed with a home study, the applicant is notified.

4. The applicant requests the agency they are currently contracting through transfer their file to Pathways.

5. Upon receiving the file from the other agency the Home Share Manager:
 - Contacts the applicant to request any requirements that are missing or outdated, specifically: Criminal Records Review, first aid and CPR, Food Safety certificate, driver's abstract, proof of \$3,000,000 third party liability on vehicle insurance, a "Physician's Declaration of Good Physical and Mental Health". If the original home study with references is not part of the transferred information, then the applicant is asked to submit two references.
 - Conducts a home study. If the original home study was transferred with the file then the interviews are guided by the questions in the "Modified Home Study Notes" document. If the original home study was not transferred then home study interviews are guided by the suggested questions in the "Home Study Questions" document. The Home Study Health and Safety Checklist is completed. The home study process may end at any time if the Home Share Manager feels that the applicant is not suitable for approval. If this is the case the applicant is notified.
6. When the home study is complete a "Home Study Recommendation" is completed and submitted to the Executive Director for review. A recommendation to approve upon receipt of required documentation can be made. If the recommendation is to not approve, the applicant is notified.
7. After the required documentation is received and in place, the applicant becomes an approved home share provider.
8. Complete Step 6 in **Application to Provide Home Share** above.

Exception to Policy

1. If a Home Share Provider wants to support two individuals, CLBC requires that an "Exception to Policy" process take place. The Home Share Manager must contact the CLBC Liaison Analyst to ask that the process take place.
2. The CLBC Liaison Analyst and the individual's facilitator will complete their portions of the "Home Share Exception" form and send to the home share coordinator, to complete their portions. Once complete, the home share coordinator will save the document as a PDF and send back to the CLBC Liaison Analyst.
3. Once it is determined that the situation is suitable for all persons involved, a move-in date is scheduled and the home share coordinator completes Steps 8 and 9 in **Assisting Individuals to Find Home Share** above.

Individual Changes 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 Manager emails the CLBC Facilitator and Analyst that the individual would like to move.

3. The CLBC Facilitator and Analyst will advise the Home Share Manager how to proceed, if the individual wishes:
 - Pathways to locate another Home Share Provider, then the “Assisting Individuals to Find Home Share” section of this procedure will be followed.
 - Another agency to locate a home share situation then the Home Share Manager follows the “Individual Transitioning from Pathways Home Share” procedure below.

Individual Transitioning from Pathways Home Share

1. The Home Share Manager:
 - Coordinates a transition meeting and using the form “Transition Plan Home Share” 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.
 - Updates the Home Share Funding Guide Template (see Home Sharing Payments and Funding Guide Templates procedure)
 - Notifies the CPD-Intake of the exit so that the “Exiting Pathways Procedure” can be followed.
 - Updates the Home Share Contractors list in ShareVision.
 - Updates the “Revenue Home Share” spreadsheet cutting the information and pasting it to the bottom of the spreadsheet.
 - Completes responsibilities in the “Exiting Pathways Procedure.”

Emergency Placements

1. If a situation arises that a person needs to move immediately, the Home Share Manager contacts any suitable emergency respite providers, either from the Home Share Contractors list or Home Share Situations Available list. A list of home share providers who are available for emergency respite is also located on the server Management>Home Share>Team Meetings – Home Share>Home Share Work spreadsheet.
2. Once a suitable situation is found, the Home Share Manager arranges for the individual to move in. For emergency placements, the Home Share Manager may have to assist with the move-in process if the individual does not have a family member or support persons available to do so.
3. The Home Share Manager notifies the CLBC Liaison of the situation, where the individual is staying, and for how long.
4. The Home Share Manager updates the Home Share Payments spreadsheet located on the server Management → Budgets → Revenue Home Share according to the “Home Share Payments and Funding Guide Templates” Procedure.
5. Once the individual has moved into the emergency placement, the Home Share Manager checks in with them 3 days after, one week after, and two weeks after their transition date.

Contract Termination

1. If:

- Pathways terminates a contract due to provision outlined in the contract, a letter terminating the contract is sent via email and Canada Post outlining contract provision violations.
- The Contractor serves notice on their contract, a confirmation e-mail is sent which includes the date that the notice was given.
- A contract is expiring and Pathways is choosing not to renew the contract minimally 30 days prior to the expiry date, a letter stating the contract will not be renewed is sent via email and Canada Post.

2. The Home Share Manager contacts the individual and asks them if they would like to continue living with their home share provider, or remain with Pathways and move into a new home share. If the individual decides that they would like to move, follow the **Emergency Placements** procedure above.

3. The Home Share Manager completes responsibilities in the “Exiting Pathways Procedure.”