

## PATHWAYS ABILITIES SOCIETY

### **PROCEDURE: HOME SHARING MONITORING**

**Applies to:** All Personnel

Original Effective Date: January 18, 2021

Effective Date: May 27, 2024

Replaces Procedure Dated: February 26, 2024

At least twice per year, the home share coordinator will speak with the individual supported in home share privately to assess overall well-being, and the home share coordinator will complete the form "Individual Supported in Home Share – Interview". Pathways also contacts the person's support network to get as much information as possible to make sure everyone is happy with the services provided.

#### **Monitoring Home Share Service Provision**

1. Home Share Monitoring reviews are completed by the Home Share Manager four times per year to ensure that the person being supported is safe, receiving the support and service that they want, and that the contract is being carried out as it was written.
2. Once an individual moves into home share, the home share coordinator does an informal check-in with both the home share provider and the individual one week after, and two weeks after the move-in date. These conversations and any other important information are documented in the ShareVision list "Home Share Manager Notes and Site Visits".
3. An official follow-up meeting takes place 30 days after an individual has been placed with the Home Share Provider. The meeting is in the home with the Home Share Provider, the individual supported and any other participants they would like to invite.
4. The first monitoring review takes place 90 days after an individual has been placed with the Home Share Provider. The format of this meeting reflects the Home Share Monitoring visit requirements that are closest to the date.
5. The Home Share Manager meets in the home with the Home Share Provider at least four times per year. There are four separate monitoring reviews completed annually: "Well-Being and Quality of Life" in January/February, "Safety" in April/May, "Planning and Systems" in July/August, and "Satisfaction" in October/November. The Home Share Manager may request the supported individual be present at these monitoring visits. If the home share provider is responsible for overseeing medication administration for the individual they support, medication competency-based training is completed with the home share provider using the "Medication Competency Training" form when they begin home share, and annually at the Home Share Safety Monitoring visits.
6. The monitoring visits are documented using the specific "Home Share Monitoring Review" forms located on the agency server under Management→Forms→Pathways

Forms→H→Home Share Forms→Monitoring Forms. Any follow up required is documented in the form. Once the monitoring visit is complete, the home share coordinator documents this visit in the ShareVision list “Home Share Manager Notes and Site Visits”. Actions taken to follow up on identified items are also documented in this list. Outstanding items for follow up are reviewed during the monthly Home Share Managers meeting. If there are any requirements that have been outstanding for over a month, the Home Share Manager will write a letter to the Home Share Provider, giving them notice that their contract will be terminated in 30 days if the requirement(s) are not received within that time frame.

7. The Home Share Manager meets with the individual supported at least twice per year. These meetings are to take place in April or May, and October or November of each calendar year. These meetings can take place during a regular monitoring visit at the home, at Pathways, or somewhere in the community. Each meeting must take place privately with the individual and the form “Individual Supported in Home Share-Interview” is completed. These meetings are an opportunity for the individual to confidentially disclose their experience in home share, without fear of conflict or judgment. Meetings with individuals are documented in the Individual’s Notables list and the completed form is attached.

8. The Home Share Provider is responsible for directing any respite persons to come to Pathways with their driver’s license to complete the Criminal Record Check form for Vulnerable Adults. When the Home Share Provider uses respite that lasts longer than one day they must inform the Home Share Manager of the dates of respite and provide the Home Share Manager with the contact information for the respite provider. Any respite used by the home share provider is documented on the “Respite and Extra Funding Reconciliation” form and these are collected twice per year, in January and July, for the previous six months.

### **Monitoring Individual’s Finances**

The Contractor will not have access to the supported individual’s finances unless there are no other options available, including a Public Guardian and Trustee. If the Contractor is assisting the individual(s) with their finances, the individual’s financial statements, including receipts and bank statements, will be reviewed by the Home Share Manager at each monitoring visit or upon request. The Contractor will not use the individual’s personal finances for their own benefit.

1. When an individual moves into a home share, the management of their finances is determined. This discussion is recorded in the “Transition Plan Home Share” document. Discussion includes who oversees the individual’s finances, if assistance is required, and potential risks and safeguards that will be in place to reduce risks.

2. If the individual manages their own finances, the home share manager checks annually with the home share provider and the individual to ensure the individual is aware of reporting income, filing for income tax, and receiving GST rebates.

3. If the individual’s family is involved with managing the individual’s finances, the home share manager:

- Enquires about the system that will be used.
- Ensures the family and the individual are aware of reporting income, filing for income tax, and receiving GST rebates.
- Makes the family aware that if they manage the individual's monies, then Pathways will not oversee any of the home share provider's involvement in the individual's finances.
- Asks for input from the individual at least annually regarding whether their finances are managed to their satisfaction.
- Asks for at least annual input from the home share provider regarding the individual's finances.

4. If the Home Share Provider oversees the individual's finances, the Home Share Coordination Manager:

- Documents the Home Share Provider's plan for managing the individual's finances using the form "Home Share Provider Managing Individual's Finances". This form is reviewed and signed by the individual, the Home Share Provider, and a family member of the individual (if applicable).
- At each monitoring visit, the home share manager reviews at least two months of the individual's bank statements, identifying any large or consistent purchases and asking what they were for. The home share provider should have a tracking system in place for receipts and to identify what items the individual is spending their money on.
- Asks for input from the individual at least annually regarding whether their finances are managed to their satisfaction.
- Documents in the ShareVision list "Home Share Manager Notes and Site Visits" that a Financial Review was completed.