

## PATHWAYS ABILITIES SOCIETY

### **PROCEDURE: HOME SHARING PAYMENTS AND FUNDING GUIDE TEMPLATES (FGT)**

**Applies to:** All Personnel

Original Approval Date: January 18, 2021

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Replaces Procedure Dated: June 6, 2022

#### **Home Share Provider Payments**

Pathways Home Share Providers are paid on the 15<sup>th</sup> of each month, for that month. The Home Share Manager is responsible for reviewing and updating the spreadsheet by the 10<sup>th</sup> of the month and notifying the Finance Manager.

At the start of each month, the Home Share Manager will:

1. Open the Home Share Payment spreadsheet located on the agency server Management→Budgets→Revenue Home Share.
2. Create a new tab on the spreadsheet with the current month and highlight it in red. The tab for the previous month will be changed to no highlighted colour. Highlighting the current month in red ensures that payment information is being collected from the most current tab.
3. Copy the worksheet from the previous month and pastes the information into the new tab for the current month.
4. Review the current month's spreadsheet for any highlighted areas. New contracts will be highlighted, as well as contracts that are ending. Contracts that have a change will also be highlighted (i.e. one time payments, respite payments, etc.). The Home Share Manager will edit these changes accordingly. Any one-time payments from the previous month should be removed. Home share providers or individuals that are removed are moved to the bottom of the spreadsheet under "Left Service", once the home share provider has been paid.
5. Compare the individual's names in the Revenue spreadsheet to the ShareVision list "Home Share Contractors" to ensure that all current contracts are accounted for.
6. Compare the amounts on the Revenue spreadsheet to the amount on the Fees page (pg. 17) of the current contract. Current home share contracts are located on the agency server Management→Home Share→Home Share Providers Active →(Home Share Provider last name) →Contract. The amounts for General Funding, Extra Respite, and Funding for Supports to Shared Living should match the amounts in the corresponding columns on the Revenue spreadsheet. Note that the column "Standing Exceptions" are amounts that have been previously approved by CLBC, in which home

share providers are paid above the standard Guide to Support Allocations (GSA) home share amount. These amounts do not change.

7. Check to ensure that all individuals have the correct monthly contract rate in Column J on the Revenue spreadsheet. If this column is empty, the home share provider will not be paid. If the FGT column is empty for an individual, check the Home Share FGT (Funding Guide Template) according to the procedure below and enter which FGT the individual belongs to.

8. Confirm that all information on the spreadsheet is correct. Send the spreadsheet to the Finance Manager, letting them know it is up-to-date and ready for payment.

### **Home Share FGTs**

The Home Share Manager(s) is responsible for revising home share FGTs when an individual enters or exits a home share. Pathways has four FGTs for home share, and the contract numbers are: 3148298 (#1), 3150397 (#2), 3152082 (#3 – PSI), and 3153258 (#4). FGT #3 (3152082) is specifically dedicated to individuals receiving PSI (Personalized Supports Initiative), which exclusively provides services to individuals who have a diagnosis of Fetal Alcohol Spectrum Disorder (FASD) or Autism Spectrum Disorder (ASD).

Individual home share contracts are split between these FGTs, with a maximum of 25 contracts per FGT.

### **Adding an Individual to a Home Share FGT**

1. When an individual moves into a home share, the Home Share Manager will open an FGT spreadsheet with less than 25 individuals. Save the document with a new name, changing the last digit of the FGT number (the version number) and indicating the initials of the person who was added and the date. For example, “3148298.2.5 Pathways ACHS” would be changed to “3148298.2.6 Pathways ACHS – 01Jan2020 added JD”.

2. On Page 1, the Home Share Manager will edit the Date of Submission to include the date of when the individual moved into their new home share, and the individual’s initials. For example, if Jane Doe moved into a new home share on January 1, 2020, the Date of Submission would be “1 Jan 2020 added JD”.

If two individuals moved into home shares on the same day, they can be added to the same spreadsheet at the same time. For example, Jane Doe and John Smith moved into a home share on January 1, 2020. In this case, the Date of Submission would be “1 Jan 2020 added JD and JS”.

3. On Page 2, change the amount on line 43 to match line 41. Save the document. Line 44 should now equal \$0.00.

4. On Page 3, add the individual to a blank row. The Home Share Manager will need to add the individual's first and last name, date of birth, Paris ID# (usually located on the individual's referral), their new address, the first and last name of their new home share provider, whether the individual is over/under 65, their GSA level and number of flags. Once the GSA level is entered, the Monthly Provider Fees column will automatically populate. If the individual has Additional Supports to Shared Living, this will need to be added to the Monthly Additional Provider Fees column. This amount will be highlighted red, and the Additional Comments column will include what the Additional Supports to Shared Living are to be used for. Save the document. Once the individual has been added to Page 3, the Number of Individuals in Shared Living will repopulate on Page 1.

5. On Page 5, the Home Share Manager will change the amount on Line 10: Negotiated Manager Full Time Equivalent (FTE) to be the same as Line 10: Standard Manager FTE. Save the document. Both amounts on Line 10 should now be matching. Each individual contract should change this amount by 0.04. Save the document.

6. Send the document to the CLBC Analyst, indicating the name of the individual who was added

### **Removing an Individual from the Home Share FGT**

1. When an individual moves out of home share or passes away, the Home Share Manager will open the FGT spreadsheet with their contract. Save the document with a new name, changing the last digit of the FGT number (the version number) and indicating the initials of the person who was removed and the date. For example, "3148298.2.5 Pathways ACHS" would be changed to "3148298.2.6 Pathways ACHS – 01Jan2020 removed JD".

2. On Page 1, the Home Share Manager will edit the Date of Submission to include the date that the individual moved or passed away, and their initials. For example, if Jane Doe moved out of home share on January 1, 2020, the Date of Submission would be "1 Jan 2020 removed JD". Save the document.

If two individuals moved out of home share on the same day, the spreadsheet can be updated for both individuals. For example, if Jane Doe and John Smith moved out of home share on January 1, 2020, the Date of Submission would be "1 Jan 2020 removed JD and JS". Save the document.

3. On Page 2, change the amount on line 43 to match line 41. Save the document. Line 44 should now equal \$0.00.

4. On Page 3, the Home Share Manager will remove the individual from the spreadsheet by deleting the yellow columns only. DO NOT edit any gray columns as they will self-populate. Save the document. Once the individual is removed from Page 3, the Number of Individuals in Shared Living will repopulate on Page 1.

5. On Page 5, the Home Share Manager will change the amount on Line 10: Negotiated Manager FTE to be the same as Line 10: Standard Manager FTE. Save the document. Both amounts on Line 10 should now be matching. Each individual contract should change this amount by 0.04.

6. Send the document to the CLBC Analyst, indicating the name of the removed individual.

### **Individuals Turning 65**

1. When an individual in home share turns 65, their home share funding from CLBC decreases. To make up for this, the individual's room and board fee will increase from \$716.00 per month to \$1,005.80 per month. This change in funding needs to be reflected in the FGT.

3. The Home Share Manager will open the FGT spreadsheet with the individual's contract. Save the document with a new name, changing the last digit of the FGT number (the version number) and indicating the initials of the person who turned 65 and the date. For example, "3148298.2.5 Pathways ACHS" would be changed to "3148298.2.6 Pathways ACHS – 01Jan2020 JD turned 65".

4. On Page 1, the Home Share Manager will edit the Date of Submission to include the date that the individual turned 65, and their initials. For example, if Jane Doe turned 65 on January 1, 2020, the Date of Submission would be "1 Jan 2020 JD turned 65". Save the document.

5. On Page 2, change the amount on line 43 to match line 41. Save the document. Line 44 should now equal \$0.00.

6. On Page 3, the Home Share Manager will go to the individual's row and change the Age of Individual column to Over 65. Save the document. The Monthly Provider Fees column will change automatically.

7. On Page 5, the Home Share Manager will change the amount on Line 10: Negotiated Manager FTE to be the same as Line 10: Standard Manager FTE. Save the document. Both amounts on Line 10 should now be matching. Each individual contract should change this amount by 0.04.

8. Send the saved document to the CLBC Analyst, indicating the name of the individual who turned 65.