PATHWAYS ABILITIES SOCIETY

PROCEDURE: INDIVIDUAL SERVICE PLANNING AND MONITORING AND DISCOVERIES
Applies to: All Personnel and Persons Served

Effective/Revision Date:
April 28, 2003
May 31, 2004
May 31, 2005
March 9, 2006
September 28, 2006
November 8, 2006
February 22, 2007
April 11, 2007
July 21, 2008
August 18, 2008
November 1, 2010
March 29, 2011
June 7, 2011
September 12, 2011
February 8, 2012
September 25, 2012
March 6, 2013
July 29, 2014
December 7, 2015
July 4, 2016
June 12, 2017
June 28, 2018
September 23, 2019

Goals on ShareVision
1. The Community Placement Developer-Intake (CPD) receives an alert that an Activity/Goal Request has been created on ShareVision.

2. The CPD emails the area supervisor and asks them to review the goal.

3. The supervisor:
- Reviews the goal to determine if it is achievable. If it is achievable the supervisor asks the CPD to create the goal. If it is not he/she contacts the CPD to determine how to proceed.
- Ensures all staff are aware of the goal(s) and are assisting individuals to achieve them.

4. Staff document daily in ShareVision the progress they made assisting the person or persons they were assigned to work with that day to achieve their goals.

5. The supervisor monitors individual's goal progress documentation monthly.

Discovery Process
The Employment Manager in discussion with the supervisors appoints an Employment Developer.

Integrated Career Opportunities (ICO)
1. If the referral is strictly for employment, the Employment Manager assigns an ICO Employment Developer.   The Employment Developer meets with the individual, their family and caregivers and completes the Employment Participation Agreement at the

intake meeting the CPD has scheduled. If all parties agree to the terms of the agreement, the Employment Manager directs the CPD to enter a goal for employment in ShareVision and the Employment Developer facilitates the Discovery.

2. The Employment Developer:
- Reviews the person's ShareVision website to garner information on the person.
- Contacts the individual to begin the Discovery within five working days of being appointed. The Discovery does not exceed 30 hours over three months. If more time is required the Employment Developer requests extra time from the Employment Manager.
- At the end of the Discovery, the Employment Developer discusses with the individual what they would like to accomplish through Pathways services and assists them to formalize their goals by completing a ShareVision Activity/Goal request.

3. Upon completion of the Discovery, the Employment Manager:
- Reviews the Discovery Staging Record on ShareVision and clarifies any questions with Employment Developer.
- Emails the CPD stating the Discovery Staging Record is completed on ShareVision.

4. The CPD reviews the Discovery and captures relevant data in the Individuals Information on ShareVision, enters the information from the Goal/Activity Request form(s) and notifies the Employment Developer and Employment Manager once completed.

Activity Service
If the individual is interested in employment, the ISP facilitator reviews the Employment Participation Agreement with the individual, family and caregivers. The Activity Service Supervisor requests the CPD complete a referral to ICO for a Discovery. The CPD adds the individual's information in the Service Referral Tracker and emails the Employment Manager. The Employment Manager assigns an ICO Employment Developer or the individual is placed on the ICO waitlist for Discovery.

1. The Employment Developer:
- Reviews the person's ShareVision website to garner information on the person.
- Meets with the individual to begin Discovery within 30 days of services starting.
- Completes the Discovery within three months depending on attendance of the individual.
- At the end of the Discovery, the Employment Developer discusses with the individual what they would like to accomplish through Pathways services and assists them to formalize their goals by completing a ShareVision Activity/Goal request. The Employment Developer notifies the supervisor when the Discovery is complete.

2. Upon completion of the Discovery, the Employment Manager:
- Reviews the Discovery Staging Record on ShareVision and clarifies any questions with Employment Developer.
- Notifies the supervisor.
- Emails the CPD to review the Discovery Staging Record and capture relevant data in the Individuals Information on ShareVision.

3. The supervisor orientates the area support staff to the Discovery Staging Record and goals.

Individual Service Plan (ISP)
1. After three months of service attendance, the CPD begins the ShareVision Pathways ISP Preparation list.

2. ISPs for ICO individuals:
- The CPD prepares the ISP package for the Employment Developer with an Individual Service Plan Declined sheet.
- Proceed to steps 4 to 12.

3. The CPD with the individual in Activity Services:
- Determines and discusses the date, time, location and ISP Facilitator and/or Key Worker that will attend. If the person wants an ISP meeting but the family or caregivers do not or do not want to attend, a meeting is scheduled just involving the individual.
- Determines if the person wants to facilitate their own plan. If this is the case, the area supervisor arranges for a facilitator to assist with the process.
- Determines, by priority, who will be invited to the meeting.

4. The CPD:
-Determines the availability of Pathways' staff that may be invited to attend the meeting i.e. support staff, the area supervisor or the person's Key Worker, by email confirming the date and time that will work and tracks the information on the ISP ShareVision Prep list. The supervisor arranges coverage if necessary.
- Notifies the ISP Facilitator/Key Worker (may be already identified above).
- Contacts all identified attendees by telephone or email to invite them to the meeting and confirms a date and time. People who are unable to attend are asked if they would like to submit written goals or comments which are to be sent to the attention of the CPD. If they identify items at the time of the phone call they are documented and brought to the meeting. If it appears as though the date and time will not work for a majority of invitees, the CPD consults with the area supervisor and the individual to determine a new date and time and begins the contacting process again.
- Audits the individual's ShareVision Individual Site to determine that all information is current and complete.

5. The CPD gives the ISP Facilitator/Key Worker:
- An ISP package that includes the following: An ISP Form, a copy of Community Support and Consent form, a copy of the person's Individual Information Sheet, a copy of any existing protocols, and a blank protocol(s) form, a copy of last ISP, notes from goals, a copy of the Rights and Responsibilities and a Checklist for Individual Centered Planning Meeting for each person in attendance.

6. In preparation for the ISP meeting, the CPD when giving the ISP Package to the ISP Facilitator:
- Reviews with them the ISP package and the person's goals on ShareVision. If the individual is facilitating their own meeting the area supervisor and/or the ISP Facilitator reviews the meeting process with the individual.

- Reviews each goal the agency was responsible for assisting the person to attain and comments on the status of each goal.
- Asks that the Facilitator reviews the Rights and Responsibilities of Individuals Receiving Services document with the individual prior to the meeting date.

7. Prior to the formal ISP meeting starting, the ISP Facilitator reviews with the person and/or obtains:
- The Rights and Responsibilities of Individuals Receiving Services from Pathways document (this can be completed a few days prior).
- Takes a picture of the person for their ShareVision site.

8. During the meeting:
- The person designated to record documents the meeting on the ISP form. It is imperative that as goals are established, the recorder, or designate, rereads the goals back to the group to ensure clarity and that they have been recorded accurately. Ensure recording is legible and all information is complete and accurate.
- The facilitator ensures he/she obtains the Individual Information sheet and ensures all information is current and accurate. He/she writes missing information directly on the form. He/she ensures the following are reviewed and completed correctly: Community Support and Consent form, updated protocols, any missing information that was identified on the ISP Meeting Notification form and ensures the individual's calendar in ShareVision is accurate and up to date.

9. If the individual indicates they would like to secure employment, the ISP Facilitator reviews the Employment Participation Agreement with the individual, family and caregivers. The agreement must be reviewed and signed prior to an employment goal being created.

10. Pathways staff updates the attendees on the status of each goal the agency was responsible for.

11. If required, the attending support worker assists the person to articulate their choices and with them advocates on their behalf during the meeting.

12. Immediately after the meeting the Facilitator reviews the documentation with the CPD.

13. The CPD:
- Uploads the Community Support and Consent form to the person's site.
- Inputs the ISP data into the individuals ISP ShareVision list, updates the Individual Information sheet in ShareVision and uploads relevant documents to the person's site.
- Enters the individual's goals into ShareVision.
- Sends the information to the supervisor who ensures it is filed in the appropriate person's binder.
- Distributes copies of the typed ISP and updated forms to all participants who want a copy.
- Uploads the person's picture to their ShareVision site.

14. The area supervisor:
- Thoroughly orientates all staff to the ISP, protocols, new goals, the required steps and provides the necessary resources to implement.
- If the area supervisor feels a goal is not relevant or achievable he/she sends the person a letter or an email stating the goal cannot be addressed in a Pathways setting, removes the goal from their ShareVision goal list and places a copy of the letter or email in the person's binder.

15. Staff and Key Workers:
 - Assist the individual to work on their goals and tracks the status of the progress towards achieving the goals for the individuals they are assigned to work with daily.
- Regularly reviews goals with individuals to ensure they are up to date and to determine if there are new goals they would like Pathways to assist them with.
- Notifies the supervisor of any changes to existing goals. The supervisor implements the changes.
- Writes new goals on the Activity/Goal Request form on ShareVision. The CPD receives an alert through ShareVision that a new Activity/Goal Request has been created and follows steps of "Goals on ShareVision."

16. The area supervisors, managers and executive director ensures the goals are being addressed.

Annual ISP
1. The CPD begins the ShareVision Pathways ISP Preparation list within one year of the individual's last ISP and follows the procedure for the initial ISP done at three months.

2. Completes the steps from the Individual Service Plan section.

Individual, Caregiver or Family Declines Participation
1. If an individual (or their caregiver or family if they are the decision makers for the individual) does not want a plan of any kind completed, no formal meeting is held.

2. The Employment Developer for ICO:
- Meets with the individual and family/caregiver to review the ISP Meeting Declined form, Community Support and Consent form, a copy of the person's existing Individual Information sheet to update, a copy of existing protocols and a new protocol form to update if applicable, list of goals that the person is currently working on or has completed, a Rights and Responsibilities of Individuals Receiving Services from Pathways document.
- Returns the ISP package to CPD.

3. The CPD updates the person's ShareVision site with the information received.

4. The CPD for Activity Services:
- Audits the person's ShareVision site to determine that all information is current and complete. Information that is missing is noted on the ISP Meeting Declined Notification.
- Sends the person an ISP Meeting Declined Notification with the following: an ISP Meeting Declined form, Community Support and Consent form, a copy of the person's existing Individual Information sheet to update, a copy of existing protocols and a new

protocol form to update if applicable, list of goals that the person is currently working on or has completed, a Rights and Responsibilities of Individuals Receiving Services from Pathways document.
- Once the information is returned, updates the Individual Information, prints copies and with the forms, gives them to the area supervisor.
- Updates the Pathways ISP list on ShareVision indicating that the ISP meeting was declined.
- If goals were not identified on the ISP Preparation list, meets with the person and completes a goal form to determine the type of service they want and/or their goals.
- Enters the goals on their site, updates the ISP list on ShareVision, and emails the area supervisor informing them of the goals.
- Sends the information to the supervisor who ensures it is filed in the appropriate person's binder.

5. If the information is not returned within two weeks the CPD:
- Follows up by phone with the person and/or caregivers.
- If, after an additional week the information is not returned, the CPD contacts the area supervisor to notify him/her to notify the person in writing that they will not be able to attend until completed information is returned.

6. Complete steps 15 to 16 from the Individual Service Plan section.

Semi-Annual Service Plan Review
1. The CPD:
- Sets up and arranges the ISP Semi Annual Review if a review has been requested.
- Reviews the individual's ISP and Goal Progress on ShareVision and writes directly on the ISP Review form.
- Completes the review as predetermined by the individual.

Reviews by telephone or in person at Pathways:
The CPD:
- Documents the meeting on the ShareVision ISP Review form.
- Follows up any action resulting from the meeting i.e. new goals, lack of goal progress, or any other concerns.
- Inputs the information directly into ShareVision Pathways ISP Review list. If required the Individual Information sheet list is updated and any information that was missing is filed and/or uploaded to the Individual's ShareVision site.
- Reviews the individual's ShareVision site to determine if any information is missing. Information that is noted as missing is tracked in the Pathways ISP Review List.
- Emails the Leadership Team that the review can be viewed on ShareVision.

ICO Reviews:
- The CPD inputs the information directly into ShareVision Pathways ISP Review list and gives it to the Employment Developer.
- The Employment Developer returns the completed form to the CPD.
-The CPD inputs information on the ShareVision ISP Review form.

2. Complete steps 15 to 16 from the Individual Service Plan section.

Review by Meetings:
1. The CPD:
- Contacts people that the individual would like to attend.
- Reviews the meeting process with the person.
- Reviews the previous ISP and goals and is prepared to comment on the status of each goal the agency was responsible for assisting the person to attain.
- Reviews the individual's ShareVision site to determine if any information is missing. Information that is noted as missing is tracked in the Pathways ISP Review List.

2. To the meeting the CPD takes the following:
- Individual Information sheet to document any changes that are identified at the meeting.
- Individual's most recent ISP for review.
- Individual Service Plan Semi-Annual Review form to complete.

3. At the end of the meeting the CPD reviews the Individual Service Plan Semi-Annual Review, ensuring the comments written are accurate, informative and understandable.

4. After the meeting the CPD:
- Inputs the information directly into ShareVision Pathways ISP Review list. If required the Individual Information sheet list is updated and any information that was missing is filed and/or uploaded to the Individual's ShareVision site.
- Distributes copies to all pre-determined participants.
- Emails the area supervisor that the review can be viewed on ShareVision.

5. Complete Steps 15 to 16 from the Annual Individual Service Plan section.

Goal Monitoring
1. The supervisor and or manager of the area the person participates in is responsible for ensuring staff are assisting individuals to achieve their goals and documenting their progress daily.

2. The AQAM reports as required at the leadership team meeting the status of goal achievement.