

PATHWAYS ABILITIES SOCIETY

PROCEDURE: HOME SHARING

Applies to: All Personnel

Effective/Revision Date:

September 18, 2017

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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.
4. If the initial meeting goes well, the Home Share Manager arranges a meeting at the Home Share Providers home. The individual and their family 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. 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 Pathway 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Facilitator and CLBC Liaison Analyst that Pathways is not able to find a suitable match and asks that the referral be rescinded.
 - Advises the Community Placement Developer – Intake that the referral has been rescinded.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.
- Provides the individual and their family with the Ministry of Social Development (MSD) Shelter Information Form and informs them that it is their responsibility to get the form to MSD as soon as possible. If the individual does not have support to complete this process the Home Share Manager assists them and submits the form to MSD.
- 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 home owner’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 amended Home Share Funding Guide Templates to ensure the agreed funding is in place.
- Notifies the Community Placement Developer- Intake of the match so that 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 who is an authorized signatory or the Executive Director for signature. 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.
- Is asked to give banking information 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 works with the individual, their family and CLBC Facilitator and the new Home Share Provider to arrange the move.

In the Event That There Are No Suitable Matches

1. The Home Share Manager:

- Notifies the individual, their family, the CLBC Facilitator and the CLBC Liaison Analyst that Pathways does not have a suitable home share placement.
- Emails the CPD-Intake that the referral has been rescinded.

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 Applications.
- 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.
- Give 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 with another agency the "Sharing" form can be completed.
- Asks to see their Drivers 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 drivers abstract and asks that the abstract be emailed directly to the Home Share Manager.
- Reviews the contact information for references.
- 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 Safe certificate and MANDT or NVCI certificate. If the applicant does not have this certification suggests where they can take the courses.
- 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 Share Monitoring Safety Review". Three positive references are required. 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.

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>Home Share Providers Active (see Home Share Policy).
- Creates the Home Share Provider's record on the ShareVision List "Home Share Contractors".
- 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 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 applicants 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.

2. The applicant requests that CLBC transfer their file to Pathways.

3. 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 Safe, 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.

4. The Home Share Manager 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 Share Monitoring Safety Review 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 Pathway's 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 that 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 Safe, 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.

6. The Home Share Manager 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 Share Monitoring Safety Review 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.

7. 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.

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

9. 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.

Monitoring Home Share Service Provision

1. Home Share Monitoring reviews are completed by the Home Share Manager.

2. The first monitoring review 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.

3. The second 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.

4. The Home Share Manager meets in the home with the Home Share Provider at least three times per year. There are three monitoring reviews completed annually; Safety, Well Being and Quality of Life and Planning and Systems. The Home Share Manager may request the supported individual to be present.

5. These reviews are documented using the Home Share Monitoring Review forms. Any follow up required are documented in the form. Actions taken to follow up on identified items are documented directly in this report form.

Home Share Caseload Review

1. Monthly the Home Share Managers meet to review their caseloads and discuss any current and outstanding work to be completed. This review is documented on the agency server Management>Home Share> Excel Spreadsheet: Home Share Work.

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.
- Notifies the CLBC Liaison Analyst so that the Home Share Funding Guide Template can be amended and sent to the Executive Director.
- Reviews amended Home Share Funding Guide Templates to ensure the amendments are made.
- Notifies the Community Placement Developer- 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".