PATHWAYS ABILITIES SOCIETY

PROCEDURE: EXITING PATHWAYS
Applies to: All Personnel, Volunteers and Persons Served

Effective/Revision Date:
April 28, 2003
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May 13, 2009
September 12, 2011
December 20, 2012
August 1, 2013
December 11, 2014
June 2, 2015
January 26, 2016
July 4, 2016
June 12, 2017
October 19, 2017
June 25, 2018
January 14, 2019

Person Served Leaving a Service Area and Remaining with Pathways

1. The supervisor notifies the Community Placement Developer- Intake (CPD) via email that the person is leaving a specific service area.

2. The CPD:
- Contacts the individual and lets them know that an exit interview needs to be done and what the information is used for.
- Mails a copy of the "Exit Interview for Individuals that Received Service" form to all relevant people with a stamped envelope addressed to the attention of the Executive Director, requesting that the Exit Interview be completed and mailed back to Pathways Abilities Society. The person and/or their family or caregiver can request a formal, in person exit interview with a management representative.
- Updates and edits the Individual Calendar list on ShareVision.
- Updates and edits the Placement List if necessary.
- Updates and edits the Master Service list.

3. The Executive Director:
- Brings the completed form to the leadership meetings for review and to determine if follow-up and quality assurance changes are required.
- Gives the completed form to the Activity Quality Assurance Manager (AQAM) who implements the follow-up and quality assurance recommendations.

4. The AQAM tracks the implementation of the recommendations and reports the results at the leadership meetings. He/she files in the appropriate folder.

5. When requested, the Executive Director provides the Board of Directors with access to the completed forms.

Person Served Leaving Pathways Discontinuing Service

1. Person served, their family, advocate or CLBC provide 30 days notice.

2. The person receiving the notice informs the area supervisor and CPD by email of the last day of attendance.

3. The CPD:

- Contacts the person and/or their family or caregiver via telephone within 5 days and completes the ShareVision Pre-Exit Interview list and implements the Exit Interview policy and procedures. The activity supervisor ensures the process is completed.
- Informs CLBC by email at the end of each month, and Cc.'s the Executive Director, that an individual is leaving services, the number of hours and days of week they have been attending and the level of support needs.
- Mails a copy of the "Exit Interview for Individuals that Received Service" form to all relevant people with a copy of the completed ShareVision Pre-Exit Interview form and a stamped envelope addressed to the attention of the Executive Director, requesting that the Exit Interview be completed and mailed back to Pathways Abilities Society. The person and/or their family or caregiver can request a formal, in person exit interview with a management representative.
- Obtains the person's binder and any other documents or correspondence from the supervisor the last day the person attends. He/she gathers the person's information and confirms all documentation has been uploaded to ShareVision. Once completed, unless specified, the information is shredded.
- Edits the Individual Calendar list on ShareVision.
- Moves the person's name from the Master Service list to the Exited Services sheet in the Master Service List Excel spreadsheet and enters the last day attended in the End Date column.
- Edits and updates the Placement List.

4. The area supervisor completes an Exit Summary and provides the person with a copy.

5. The CPD:

- Changes the individuals ISP to Previous.
- Removes individuals' name from the individuals, "Individual" lookup list on ShareVision under the Contacts tab.
- Changes the individual's status to inactive on the ShareVision Individual Profile.
- Changes Caregivers and family to inactive if no longer involved in Pathways.
- Changes the individual status from Active to Exited Services, Deceased or specify your own value on the individuals Information page.

6. If the completed form is not received within two-weeks of the date it was mailed, the CPD telephones the person to inquire about the status of the form and tracks the information in the Pathways Abilities Society Pre-Exit Interview list.

7. The Executive Director:
- Notifies the CPD the form was received.
- Brings the completed form to the leadership meetings for review and to determine if follow-up and quality assurance changes are required.
- Gives the completed form to the AQAM who implements the follow-up and quality assurance recommendations.

8. The AQAM tracks the implementation of the recommendations and reports the results at the leadership meetings. He/she files in the appropriate folder.

9. When requested, the Executive Director provides the Board of Directors with access to the completed forms.

10. If requested, representatives of the society assist the individual to adjust to his/her new home or service site.

11. The area supervisor or, in the case of a home share or respite provider, the Home Share Manager, prepares and provides the person with the following:
From day sites:
- Medications.
- Appropriate file information.
- Any items they may have at the service site.

From a home:
- The individual's clothing and possessions.
- The original and current personal possession list.
- Medications.
- Identification.
- Funds.
- Appropriate file information.

12. The Executive Director ensures all information about the person is stored in a secured area for a minimum of ten years.

13. In the event that an individual dies, the person’s personal items will be released to their legal guardian or CLBC.

14. The CPD:
- Sixty days after the individual’s last day of service contacts the individual and/or their caregiver by telephone to enquire how the transition is progressing, and whether the individual requires Pathways to do anything on their behalf.
- Documents the discussion in the Exit Summary “Results of the 60 day Follow-up field and communicates actions required to the appropriate personnel.

Person Served (employee) Leaving Pathways Employment
1. The area manager or supervisor notifies the Finance Manager, Executive Director and CPD via email.

2. The area manager or supervisor gives the Executive Director the person's employee file.

3. The Executive Director or designate starts an Employee/Volunteer Departure Checklist in ShareVision and notifies the Finance Manager.

4. The Finance Manager:
- Notifies the Executive Director once she/he has completed their portion of the Employee/Volunteer Departure Checklist in ShareVision.
- Issues the Record of Employment (ROE) and concludes the employees PayWorks information.
- Includes the appropriate form (Exit Interview 1 or 2) with a stamped envelope addressed to the attention of the Executive Director, with the person's ROE and final pay stub. The employee can request a formal, in person exit interview with a management representative.

5. The Executive Director:
- Brings the completed form to the leadership meetings for review and to determine if follow-up and quality assurance changes are required.
- Gives the completed form to the AQAM who implements the follow-up and quality assurance recommendations.
- Places the employee file in the old employee file cabinet.
- Deactivates the person's Employee Files Person's with Diverse-abilities ShareVision list.

6. The AQAM tracks the implementation of the recommendations and reports the results at the leadership meetings. He/she files in the appropriate folder.

7. When requested, the executive director provides the Board of Directors with access to the completed forms.

Employees Leaving Pathways

1. The Executive Director or designate starts an Employee/Volunteer Departure Checklist in ShareVision and notifies the Finance Manager.

2. The Finance Manager:
- Notifies the Executive Director once she/he has completed their portion of the Employee/Volunteer Departure Checklist in ShareVision.
- Issues the Record of Employment (ROE) and concludes the employees PayWorks information.
- Includes the appropriate form (Exit Interview 1 or 2) with a stamped envelope addressed to the attention of the Executive Director, with the person's ROE and final pay stub. The employee can request a formal, in person exit interview with a management representative. If the departure relates to a grievance, relevant management personnel and/or union representation may be requested to attend.

3. The Executive Director:
- Brings the completed Exit Interview form to the leadership meetings for review and to determine if follow-up and quality assurance changes are required.

- Gives the completed form to the AQAM who implements the follow-up and quality assurance recommendations.
- Consolidates the employee's 4 files (employee (2 files current and old), benefits and medical into one file) and places the file in the old employee file cabinet.
- Concludes the Employee/Volunteer Departure Checklist.
- Deactivates the person's Employee Information ShareVision list.

4. The AQAM tracks the implementation of the recommendations and reports the results at the leadership meetings. He/she files in the appropriate folder.

5. When requested, the executive director provides the Board of Directors with access to the completed forms.

Volunteer and Practicum Students Leaving Pathways
1. The volunteer's supervisor notifies the Home Share Manager the volunteer is leaving.

2. The Home Share Manager:
- Completes an Employee/Volunteer Departure Checklist in ShareVision.
- Provides the volunteer with the appropriate form (Exit Interview 1 or 2) with a stamped envelope addressed to the attention of the Executive Director. The volunteer can request a formal, in person exit interview with a management representative.
- Deactivates the person's Agency Volunteer Information ShareVision list.

3. The Executive Director:
- Brings the completed Exit Interview form to the leadership meetings for review and to determine if follow-up and quality assurance changes are required.
- Gives the completed form to the AQAM who implements the follow-up and quality assurance recommendations.
- Consolidates the volunteer's file and places the file in the old employee file cabinet.

4. The AQAM tracks the implementation of the recommendations and reports the results at the leadership meetings. He/she files in the appropriate folder.

5. When requested, the executive director provides the Board of Directors with access to the completed forms.

Home Share and Respite Contractors Discontinuing with Pathways
1. The Home Share Manager:
- Consolidates the home share providers files and binders and gives them to the Executive Director for filing.
- Deactivates the Home Share provider's ShareVision account.
- Provides the contractor with the Exit Interview - Home Share and Respite Providers with a stamped envelope addressed to the attention of the Executive Director. The contractor can request a formal, in person exit interview with a management representative.
- Updates the Home Share Contractors list in ShareVision, changing the Home Share Provider's status to "inactive."
- Updates the "Revenue Home Share" spreadsheet removing the contractor's name.
- Fills out and concludes the Home Share Contractor Departure list in ShareVision.

2. The Executive Director:
- Brings the completed form to the leadership meetings for review and to determine if follow-up and quality assurance changes are required.
- Gives the completed form to the AQAM who implements the follow-up and quality assurance recommendations.

3. The AQAM tracks the implementation of the recommendations and reports the results at the leadership meetings. He/she files in the appropriate folder.

4. When requested, the executive director provides the Board of Directors with access to the completed forms.