

Agency Service Coordination Manual

1.3 Overview of Roles and Responsibilities Table

Key Roles and Responsibilities				
	Agency Staff	Service and Support Navigator (SSN) and/or Program Manager	Community Service Worker (CSW) <small>*for participants with Public Guardian and Trustee (PGT) appointed</small>	Other Department of Families Staff (e.g., Centralized Services and Resources, Protection Team)
Intake, Age of Majority Planning and Day Services Planning	<ul style="list-style-type: none"> • Submits proposals at intake if involved prior to eligibility • Responsible for age of majority (AOM) and day services planning activities following transition to pilot project • Collaborates with school for AOM planning • Coordinates transportation • Reviews day service funding proposals and completes Funding Request Form • Makes referral for Supports Intensity Scale (SIS) assessment 	<ul style="list-style-type: none"> • Acts as a resource when day service options are being explored 	<ul style="list-style-type: none"> • Participates in day service selection • Ensures consent is provided by PGT to provide personal health information on day program referrals 	<ul style="list-style-type: none"> • Maintains responsibility for intake and eligibility determination, including appeals • Responsible for AOM planning prior to transition to pilot project • If agency is already involved, Centralized Services and Resources (CSR) or Program Manager reviews proposal for appropriateness and assigns file to SSN or CSW as appropriate
Supports Intensity Scale Assessments, Referrals and Reviews	<ul style="list-style-type: none"> • Completes SIS referrals • Participates in SIS assessments • Reviews completed assessment for accuracy and contacts the SIS team if important information is missing • Provides recommendation regarding exceptional needs as requested • Utilizes SIS assessment to inform planning 	<ul style="list-style-type: none"> • Provides copies of previous assessments and/or confirmed assigned support budget level as requested • Distributes participant support budget levels on a quarterly basis • Program Manager reviews exceptional needs recommendation from agency and verifies support budget level 	<ul style="list-style-type: none"> • Ensures SIS consent form is signed by PGT 	<ul style="list-style-type: none"> • May submit initial SIS referral at point of intake • Conducts SIS assessments • Provides SIS Training to agencies as required • Maintains documentation of SIS reports and support budget levels
Person-Centred Planning	<ul style="list-style-type: none"> • Responsible for coordination of all planning activities, including: scheduling of meetings, inviting appropriate planning team members, documenting and distributing plans, implementing as agreed upon, maintaining on participant files and updating as required 	<ul style="list-style-type: none"> • Provides consultation as requested • Participates in resolution process if the plan or implementation of support services is appealed 	<ul style="list-style-type: none"> • Participates in planning meetings at their discretion • Provides consultation as requested 	<ul style="list-style-type: none"> • Reviews plans for completion during RCL annual reviews (residential care only)

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	<ul style="list-style-type: none"> Invites CSW to all planning meetings for participants with PGT appointed as SDM Seeks approval for Individualized Support Plans (Home Alone) from agency program manager, SDM if applicable and Agency Director Seeks recommendation of a qualified professional for restrictive practices in a Behaviour Support plan. The SDM must also be in support if applicable 	<ul style="list-style-type: none"> May become involved when consensus cannot be reached within planning team in development of Behaviour Support Plan 	<ul style="list-style-type: none"> Reviews and approves all plans, signs where necessary and forwards to PGT for final approval Provides confirmation of PGT approval to the agency designate 	<ul style="list-style-type: none"> Program Specialist may be brought in if consensus cannot be achieved in development of Behaviour Support Plan
Exploring Resources and Referrals and Working with Partner Agencies	<ul style="list-style-type: none"> Explores all publicly funded resources prior to sending referral for funding Completes referrals for internal services and consults with SSN/CSW as required Assists individual with EIA Responsible for coordination and planning associated with incarceration and justice involvement, ensures institution is aware of vulnerable person status, relevant health information and access to representation 	<ul style="list-style-type: none"> Provides consultation as requested, including whether internal resources are available and appropriate Confirms funding implications with CSR/RNS in the event of incarceration or hospital admission 	<ul style="list-style-type: none"> Participates in selection of required support services Obtains consent for referrals from PGT where required Communicates with PGT regarding incarceration or hospital admission 	<ul style="list-style-type: none"> Maintains intake function for internal services such as CLPS, BPS, DHSU
Management of Personal Funds	<ul style="list-style-type: none"> Responsible for all aspects of financial planning process Seeks approval of Personal Financial Plans as required Makes changes to Personal Financial Plan when requested by CSW or PGT/other SDM Personal Financial plans are authorized within internal escalation structure Seeks approval of expenditures as required 	<ul style="list-style-type: none"> Authorizes expenditures (over \$800 and additional criteria) Reviews situations when personal spending exceeds \$1000 in six month period 	<ul style="list-style-type: none"> Reviews Personal Financial Plan and forwards to PGT for final approval Authorizes expenditures over \$200 	<ul style="list-style-type: none"> Personal Financial Plans are reviewed for completion during RCL annual review (residential care only)

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SDM applications	<ul style="list-style-type: none"> • Assists individual to develop decision making capacity or support network where appropriate • Conducts assessment and corresponds with support network about whether an SDM is necessary as a last resort • May consult with SSN/CSW or directly with VPCO • Completes SDM application and compiles supporting documentation • Provides additional information to VPCO as requested • Serves individual with Notice of Hearing, completes the Declaration of Service and returns to the VPCO • Participates in SDM Hearing Panel and assists individual to participate • If appointment is made, educates staff on implications of appointment • Completes paperwork for SDM review, variation, suspension/replacement, emergency SDM or termination as required • Communicates any changes to an individual's SDM appointment within 5 business days • Maintains copies of the SDM documentation in the individual's file 	<ul style="list-style-type: none"> • Provides consultation to agency designate when requested • Documents any change to SDM appointment in inFACT 	<ul style="list-style-type: none"> • Provides consultation to agency designate when requested 	
Client Files and Documentation	<ul style="list-style-type: none"> • Maintains hardcopy and/or electronic participant files, including all relevant information as described in procedure manual • Records all participant contact in case notes • Informs SSN/CSW of updates to demographic information • Maintains documents and information related to quality assurance and reviews 	<ul style="list-style-type: none"> • Maintains electronic participant files • Documents critical information in inFACT as required • Demographic information in inFACT is kept as current as possible – receive bi annual spreadsheet 	<ul style="list-style-type: none"> • Documents actions related to delegated authority in inFACT • Maintains hardcopy participant files 	

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Information Sharing	<ul style="list-style-type: none"> Submits all confidential or sensitive correspondence using Secure Email Transfer Service Obtains consent from participant before sharing personal information with third parties 	<ul style="list-style-type: none"> Uses password-protected When emailing participant information outside of government, SSN/PM will use password protected emails, and send password in a separate email Ensures agency staff are using SETS to email participant information 	<ul style="list-style-type: none"> Emails with participant information will be password protected, and a separate email for the password ensure agency designates are using SETS to email participant information 	<ul style="list-style-type: none"> When emailing participant information outside of government, GOM staff will use password protected emails, and send password in a separate email
Funding Requests and Approvals	<ul style="list-style-type: none"> Completes funding requests (FARF and additional information as required) and submits to SSN Seeks approval for proposed services from CSW prior to submitting requests for participants with PGT appointed as SDM Conducts ongoing reviews of funding utilization and communicates with SSN as required Informs SSN of hospital admission or incarceration Completes Exceptions Review Form as required Ensures participants have SIS assessments that reflect current needs Reviews service plans and funding proposals from external agencies, completes FARF where required 	<ul style="list-style-type: none"> Reviews all funding requests for completion and appropriateness Submits funding requests to CSR or the RNS Program Manager Communicates funding decisions to agency designate Reviews incident reports regarding hospital admission or incarceration, communicates funding implications to CSR/Rural PM, ensures CSW is aware if individual has PGT appointed Provides consultation, assistance and capacity building when concerns with the proposed service plans or funding requests are identified 	<ul style="list-style-type: none"> Reviews proposed services and determines whether proposed services are appropriate Provides updates as required to PGT regarding support services 	<ul style="list-style-type: none"> Maintains all decision making with respect to funding CSR/Rural PM: <ul style="list-style-type: none"> provides consult when questions about funding or service plan arise determines funding level if support budget level has not been assigned submits funding requests to Funding Committee where required inputs service plans into inFACT sends funding authorizations and termination
Conflict Resolution and Mediation	<ul style="list-style-type: none"> Acts as first point of contact for all participant related Escalates concerns to agency program manager or SSN as required Communicates any relevant information to staff or members of the support network as appropriate Facilitates further planning if required following resolution of a concern 	<ul style="list-style-type: none"> Provides consultation, problem solving or mediation where required Reviews concerns escalated by agency designate, gathers information from both parties, escalates to CLDS program manager where required Where CLDS program manager is involved, formal direction provided in writing 	<ul style="list-style-type: none"> Provides consultation, problem solving or mediation where required 	<ul style="list-style-type: none"> Provides consultation or direction regarding concerns that cannot be resolved by the SSN and CLDS program manager

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		<ul style="list-style-type: none"> Follows up with agency designate following a resolved concern to confirm actions have been implemented as directed 		
Formal Complaints	<ul style="list-style-type: none"> Participates in discussions at request of SSN Stores documentation on the individual's hardcopy file Facilitates further planning if required, depending on the outcome of the complaint 	<ul style="list-style-type: none"> Reviews and triages complaints Involves additional department staff as appropriate Contacts the individual making the complaint and/or the individual the complaint is about Obtains consent from the individual Schedules a time to discuss the complaint and an action plan with the individual and others as appropriate Documents and shares action plan with others as appropriate Documents the complaint, a summary of the discussion and action plan in inFACT Follows up as per the timeline outlined in the action plan 		<ul style="list-style-type: none"> Provides consultation or direction regarding complaints that cannot be resolved by the SSN and CLDS program manager
Suspicious Death and Serious Injury	<ul style="list-style-type: none"> Immediately reports all serious injuries and deaths to the SSN/CSW, program manager, family/guardian and SDM Follows protection procedure as required Participates in the review process as requested Follows case closure procedure as applicable 	<ul style="list-style-type: none"> Initiates internal review protocol where required Gathers information from the agency designate Completes case closure procedure as required 	<ul style="list-style-type: none"> Communicates with PGT as required 	<ul style="list-style-type: none"> Determines the need for an internal review of services Appoints an appropriate reviewer Conducts review

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Ministerial Inquiries	<ul style="list-style-type: none"> • Upon notice of an inquiry: collects all information required, completes the response section of the Ministerial Inquiry Template and submit to the SSN 	<ul style="list-style-type: none"> • Completes the participant information and summary of inquiry sections of the Ministerial Inquiry Template and submits to the agency designate for a response • Reviews the completed Ministerial Inquiry Template for completion, requests additional information as required 		<ul style="list-style-type: none"> • Notifies the SSN of the Ministerial Inquiry • Reviews information submitted by agency and SSN, determines if further follow up is needed • Submits formal response to the Minister's Office
Residential Care Licensing	<ul style="list-style-type: none"> • Continues to participate and comply with all existing RCL requirements • Addresses concerns or compliance issues as identified by RCL and/or the SSN • Submits incident reports to RCL using SETS 	<ul style="list-style-type: none"> • Participates, as requested by RCL, to assist agencies to address: <ul style="list-style-type: none"> ○ the safety and well-being of resident(s); ○ ongoing compliance issues with limited follow up by the service provider; and/or ○ monitoring of the facility by the service provider in general. • Follows-up with agencies at pre-determined intervals until all issues identified by RCL are resolved • Updates the RCL Case Manager on progress made to resolve identified concerns 	<ul style="list-style-type: none"> • CSW will be informed if significant concerns arise from RCL annual review 	<ul style="list-style-type: none"> • RCL will continue to conduct annual reviews of Letters of Approval (LOA) and licences to ensure compliance with licensing standards and program expectations, as well as making recommendations for follow-up as required
Incident Reporting	<ul style="list-style-type: none"> • Receives and reviews all incidents submitted from staff within the agency and/or from partner agencies • Assesses incident for potential protection concerns and refers to protection team or RNS program manager when required • Notifies appropriate department staff of incident within 24hours or next business day 	<ul style="list-style-type: none"> • Reviews all incident reports received • Ensures potential protection concerns have been referred to protection team or RNS program manager • Completes inFACT case notes and digitally files incident report • Forwards IRs as appropriate to the CSW for participants with PGT appointed as SDM 	<ul style="list-style-type: none"> • Reviews incident reports received from SSN • Notifies PGT where appropriate 	<ul style="list-style-type: none"> • RCL receives and reviews all incidents that occur within a residential care facility • Transportation Coordinator receives and reviews all incidents that occur during transportation to/from a day service

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	<ul style="list-style-type: none"> Submits incident reports via SETS to appropriate department staff within five days Determines and implements appropriate action following incidents Maintains all incident reports on participant files Monitors and reviews frequency and type of incident reports for potential trends or patterns 			<ul style="list-style-type: none"> The Protection Team or RNS program manager receives and reviews all incidents with potential protection concerns, conducts investigations where required
Protection	<ul style="list-style-type: none"> Notifies Protection Team or RNS program manager of allegations or suspicions of abuse or neglect Assists individual to contact the police if they choose Provides information to department as requested Follows recommendations outlined in follow-up letter and communicate this with SSN 	<ul style="list-style-type: none"> Receives notification when a protection investigation is initiated Receives and maintains electronic copy of Protection Investigation report and letter Follows up with agencies to ensure compliance with recommendations Documents in inFACT 	<ul style="list-style-type: none"> Receives notification when a protection investigation is initiated Documents in inFACT Notifies PGT of protection concerns and investigations 	<ul style="list-style-type: none"> The Protection Team or RNS program manager receives and reviews all protection concerns, completes allegation review, conducts investigation where required, submits correspondence to appropriate parties with recommendations for follow-up
Case Closure and Transfer	<ul style="list-style-type: none"> Advises SSN of potential agency discharge and case closure situations Advises SSN of situations of case inactivity Completes agency discharge form Provides copy of file contents to SSN 	<ul style="list-style-type: none"> Provides consultation in situations of case inactivity Prepares file for archival or transfer to community area Documents discharge summary into inFACT 	<ul style="list-style-type: none"> Confirms with PGT that CLDS file can close Planning around agency discharge must occur with PGT 	<ul style="list-style-type: none"> Addresses funding implications