

Agency Service Coordination Manual

3.1 Intake, Age of Majority and Day Services Planning

Background

Intake is a central function of the Community Living disABILITY Services (CLDS) program which involves receiving applications for the program and determining eligibility based on psychological assessment and other supporting documentation. The intake process and determination of eligibility remains unchanged in the pilot project, and will continue to be administered by department staff.

This procedure clarifies roles and responsibilities once eligibility is established and an individual transitions to the Service Coordination Pilot Project for case management.

Process

Assignment to a Pilot Agency

- **Once eligibility is established, individuals are typically assigned to a Community Service Worker (CSW) for initial assessment and service planning. The CSW submits referrals for service, selects appropriate service provider(s) and submits Funding Approval Request Forms (FARFs) to Centralized Services and Resources (CSR) in Winnipeg, or the appropriate Rural and Northern Services (RNS) Program Manager. In the event a pilot agency is approved as the residential service provider, the CSW and/or CLDS Program Manager will contact the Service and Support Navigator (SSN) team to transfer the file to the pilot project. This may occur prior to the final approval of funding.**
- There may be situations where an individual is involved with a pilot agency prior to their transition to CLDS. In the event the agency wishes to continue to support the individual, they may submit a proposal, consistent with current practice.
 - The intake worker may assist the individual and support network by ensuring the proposal is forwarded to CSR or the RNS Program Manager.
 - CSR or the RNS Program Manager will review the proposal to determine whether it is appropriate to the individual's needs and cost effective.
 - In the event the proposal is deemed a good fit, the individual will be transferred to the pilot agency for case management and assigned to the corresponding SSN. This may occur prior to the approval of funding.
 - In the event the proposal is not deemed a good fit, or other service options should be explored, the individual will be transferred to a CSW for ongoing case management and service planning.

- In the event the individual had not yet been referred for a Supports Intensity Scale (SIS) assessment, the agency delegate will make a referral at the earliest convenience, as described in the SIS section of this manual.

Transitioning from Youth Services

- There may be scenarios where a youth in care of Child and Family Services (CFS), or a youth involved with Children's disABILITY Services (CDS), receives support from a pilot agency.
- Throughout the transition to adult services, the pilot agency may be an active participant in planning, but will not be responsible for case management until that time when a service plan with the agency has been agreed upon as described above.
- For more information on transitions to adult services, please refer to [Bridging to Adulthood: A Protocol for Transitioning Students with Exceptional Needs from School to Community \(2008\)](#).

Age of Majority Planning

- For individuals entering CLDS at age 18, there may be some case management activities focused on ensuring a smooth transition to adult services. Once an individual has transitioned to a pilot agency, the agency designate will be responsible for all aspects of age of majority related case planning and service delivery, which may include, but is not limited to:
 - coordination with individual's school staff and attendance at Individual Education Plan meetings;
 - residential planning;
 - summer programming if the participant resides with family or in a home share, until age 21 when eligibility for day program funding begins; and/or
 - planning for day services.
- Note: Not all age of majority individuals will be attending school. An individual's wishes and goals should be clearly identified in the person-centered planning process, along with actions that can be taken to support the individual in achieving their goals.

Planning for Day Services

- CLDS funding for day services begins in July of the year an individual turns 21. Prior to that, day activities for individuals with intellectual disabilities is provided

by the Department of Education. Planning for day services should begin at least a year before the individual will be eligible.

- For individuals that remain in high school, the school will typically facilitate exploration of day services with students. This will include trials with various day services in order to give the student an opportunity to determine their preferences.
 - The agency designate is responsible for participating in planning with school staff and the support network. The planning team will determine who takes the lead, including who will submit referrals for services.
- For individuals that are not in school, the agency designate will assume responsibility for day services planning.
- Where possible, day services in close proximity to an individual's home address should be considered, in order to ensure they are within boundaries for funded transportation. The agency designate should consult with Centralized Services and Resources (CSR) or the RNS Program Manager regarding transportation routes and available day services within the region.
- Once an individual, in collaboration with their support network, has selected a day program that they would like to attend, the agency designate may be required to complete the referral form for the program and correspond with the day program about the individual's plans to attend the program, including a start date and potential funding.
- While the day services agency will submit their proposal to CSR or to the RNS Program Manager, the agency designate may be required to complete a Funding Approval Request Form to supplement the proposal. For more information, see the Funding Requests section of this manual.
- **Once approved, and prior to the implementation of services, the agency designate will ensure that the individual and/or their Substitute Decision Maker (SDM) have provided consent to share information with the day services agency. The agency designate will share all relevant information to ensure the health and safety of the individual, including but not limited to, current person-centred plans, support plans and situation-specific plans or protocols (e.g., health care plans, behaviour support plans).**

Standards

- The CLDS program retains all responsibility for the intake and eligibility determination process.

- **The CSW is responsible to submit proposals and completed FARFs to CSR or the RNS Program Manager for new intakes. New intakes will not be transferred to a pilot agency for case management until a proposal has been approved in principle. This may occur prior to the final approval of funding.**
- For individuals aged 18-21, planning for day services should begin at least one year prior to becoming eligible for day services.
- **The agency designate will obtain consent from the individual and/or their SDM prior to sharing information with a day services agency.**