

Agency Service Coordination Manual

5.2 Exploring Resources, Making Referrals and Working with Partner Agencies

Background

Person-centred planning is utilized to assist an individual to identify the services and supports required to meet their needs and goals. This procedure describes processes for exploring a number of resources that may be identified through person-centred planning, as well as roles and responsibilities for making referrals. While there are many resources that are not described in this procedure, it is expected that the agency designate will lead the exploration of appropriate resources, including referral and implementation planning.

Similarly, the coordination of supports and services is critical to the case management process. As the key contact in matters related to case management, the agency designate will be responsible for ongoing communication with members of multi-disciplinary service delivery teams, including staff from government departments, partner agencies, advocacy organizations and support networks.

Process

Exploring Resources and Making Referrals

The agency designate provides information on resources to the individual throughout the person-centred planning process to assist the individual with choosing the most suitable and preferable options. Information may include:

- eligibility criteria for specific resources appropriate to the individual;
- the process for accessing resources (funding requests, forms to be filled out); and
- the limitations that may be encountered (e.g., waiting lists, funding limits, prioritization of needs).

Referrals to resources will be completed by the agency designate within time frames as specified throughout the person-centred planning process or in consideration of the urgency of the individual's needs. Dependent on the resource or the region, referrals are forwarded to service providers directly or to appropriate department staff.

Note: for individuals with the Public Guardian and Trustee (PGT) appointed as their Substitute Decision Maker (SDM), the agency designate will work in collaboration with the assigned Community Service Worker (CSW) when exploring potential support services. While the agency designate may lead these activities, the CSW is responsible for the approval of selection of a particular support service and/or service provider, as per the delegation of authority agreement with the PGT.

I. Day Services

- Individuals become eligible for day services on July 2nd of the calendar year in which they turn age 21. The goal of day services is to support individuals in daily activities which increase independence, productivity and community integration, including access to competitive employment, training and support.
- Individual areas of emphasis and the type of day services support required are based on the goals and objectives established with individuals through the person-centred planning process.
- Further to the Intake, Age of Majority and Day Services Planning section of this manual, planning for day services should begin at least a year before the individual will become eligible.
- For individuals that remain in high school prior to age 21, the high school will typically facilitate exploration of day services with students in the years leading up to graduation. 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, or who are older than age 21, the agency designate will assume responsibility for day services planning.
- Where possible, day services in close proximity to the 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 section of this manual.
- Once approved, and prior to the implementation of services, the agency designate will ensure that the day services agency is provided with 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).

II. Clinical Services

There may be circumstances where an individual requires additional clinical support, therapy or assessment. While agencies may have internal clinical resources that have been previously approved by the department, external referrals may also be necessary.

Where an external referral is required, agencies should first explore publicly funded community resources that are available and appropriate to meet the individual's needs. The agency designate may choose to consult with the SSN or CSW to determine the most appropriate and cost-effective option available before submitting a proposal. Funding for clinical services is time limited and approved on a case-by-case basis, as described in the Funding Section of this manual.

Individuals may also be eligible to utilize internal department resources as described below:

a. Community Living Psychiatry Services

- Community Living Psychiatry Services (CLPS) is an internal psychiatry service that may be available for individuals receiving supports from CLDS. CLPS offers psychiatric assessment as well as medication consult to the individual's family doctor as necessary.
- It is noted that referral to CLPS does not guarantee a psychiatric assessment or involvement from the CLPS psychiatric team. Any requests for transfer of care will be determined on a case-by-case basis. Wait time for service may vary from 3-6 months. CLPS is unable to accept urgent referrals, as these referrals are better served by emergency resources in the community.
- The agency designate must consult with the SSN if a referral to CLPS is being considered to ensure that it is an appropriate referral and that the individual would not be better served by another service.
- The SSN will verify with the agency designate that the individual has a family doctor, and is consenting to the referral. A letter of referral may be required from the individual's family doctor. If the criteria are met, the SSN will provide further instruction on how to submit a referral to CLPS.

b. Behavioural Psychology Services

- Behavioural Psychology Services (BPS) is a provincial service delivered by the Department of Families to provide consultation to families, caregivers and other support staff who provide care for individuals with a developmental disability. The consultative service involves a Behaviour Specialist, working together with caregivers and support teams to develop strategies to decrease challenging behaviours and increase pro-social behaviours and other important life skills.
- BPS is meant to provide temporary supports to the networks of individuals, as a last resort to individuals, who do not have access to other clinical services.

- Once all other available resources have been exhausted, the agency designate may consult with the SSN to explore whether BPS is an option for individuals involved in the pilot project. If appropriate, the SSN will provide further instructions on how to proceed with a referral.

Working with Partner Agencies and Programs

The agency designate is responsible to work in partnership with a number of stakeholders and partners as part of the service coordination process. As with any change, it is expected that it may take time for all parties to adjust to new processes as part of the Service Coordination Pilot Project. Agency staff are encouraged to communicate directly with all partner agencies and programs, but may involve the SSN or CSW if required.

I. Employment and Income Assistance

- Many individuals who are involved with CLDS receive income from Employment and Income Assistance (EIA). The agency designate is responsible for assisting the individual in corresponding with EIA as needed, and to ensure that EIA requirements are met. This may include, but is not limited to:
 - assisting with application for EIA benefits, including compilation of relevant documentation;
 - completing annual reviews;
 - completing income declarations for individuals receiving income;
 - responding to correspondence from the EIA program;
 - informing EIA of all relevant changes in regards to living arrangement and employment status; and/or
 - obtaining necessary tax forms and ensuring that income taxes are completed annually.
- The agency designate may also assist the individual to advise EIA of their residential arrangement.
 - For individuals in Supported Independent Living, the agency designate may provide assistance obtaining rental agreement forms.
 - For individuals in Home Shares or Shift-Staffed Homes, or when they are required to pay room and board, the agency designate will be responsible to complete the Residential Care Rate Authorization Form. The agency may consult with the SSN or CSW if there are questions on how to complete his form.
- When an individual requires assistance with the management of personal finances, including their EIA budget as indicated on their personal financial plan,

the agency designate is responsible for providing this assistance or ensuring that the assistance is being provided by another party in the support network.

- When an individual becomes eligible for CPP, the agency designate will assist the individual to navigate this process. If there are funding implications for an individual's residential placement, the agency designate will communicate with CSR in Winnipeg or the RNS Program Manager, as well as the SDM if applicable.

II. Department of Justice (Probation or Corrections)

- The agency designate will be the main point of contact for federal and provincial corrections, including institutions, probation and parole.
- Upon finding out that an individual has been incarcerated, the agency designate must contact the institution to:
 - ensure they are aware that the individual is a vulnerable person;
 - provide the contact information for the agency designate, to be documented in the individual's file; and
 - provide any relevant health information that the institution must have in order to ensure the individual's health and well-being while incarcerated.
- The agency designate will assist the individual to ensure they have adequate and appropriate legal representation.
- The agency designate will assist with all required planning and coordination for an individual's release to the community.
- Note: if the individual's CLDS file has been closed during incarceration, and the agency designate is contacted regarding the release, the agency designate should inform the SSN to begin the process of having the file reopened.

III. Disability and Health Supports Unit (DHSU)

- Individuals involved with CLDS may require additional support for health-related supplies, equipment, nutritional or diet supplements based on a diagnosed medical need. The Disability and Health Supports Unit (DHSU) assists eligible participants access these disability and health-related supports in a consistent, fair and efficient manner.
- The DHSU reviews and assesses all requests submitted by health professionals on behalf of CLDS program participants. The DHSU will be responsible for the assessment, approval and procurement of all nutritional supplements and diets, supplies and equipment funded by EIA, CDS, and CLDS. When approved, the DHSU will arrange for the Province of Manitoba's Materials Distribution Agency (MDA) deliver these products to clients.

- All requests will be sent directly to the DHSU by the consulting professional and DHSU staff will be responsible for determining approval of the request based on current CLDS policy and practice guidelines. The following forms can be submitted by the appropriate consulting professional:
 - Therapeutic Diet and Nutritional Supplement Request and Justification Form
 - Medical Equipment Request and Justification Form
 - Medical Supply Request and Justification Form
 - Wheelchair Seating Component Request and Justification Form
- DHSU staff may contact the SSN or CSW, in absence of contact information for the agency designate. The SSN or CSW will provide contact information in order for DHSU staff to obtain additional information if required (e.g., layout of the residence).

Standards

- Support services should be explored and implemented based on an individual's goals and objectives identified as part of person-centred planning.
- The agency designate must obtain signed consent in order to communicate with partner agencies and programs on an individual's behalf, in accordance with the Freedom of Information and Protection of Privacy Act and the Personal Health Information Act.