



SERVICE DELIVERY (OUTCOME BASED)

SUPPORT PLANNING PROCESS

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1) Support Planning Process

Introduction

SASH's Support Planning Process outlines our outcomes based service delivery system which brings together person centered planning and individual support needs by identifying **what is important to the individual and what is important for the individual**. The process will be positive and the choices and preferences of the individual and his/her family will be fundamental to the planning process. The "My Support Plan/Individual Support Plan/" **goals will be** developed as a result of the planning process

Ideology

The purpose of SASH supports is to assist individuals with development disabilities to develop to their fullest potential by offering supports and services that enhance physical, material, and emotional well-being, personal development, self-determination, individual rights, social inclusion, and interpersonal relationships. The Society emphasizes the importance of each individual's strengths and needs, to realize and develop measurable goals and outcomes through supporting skill development, independence, and informed choices. The objective of the Society is to assist each individual to achieve his or her highest potential.

SASH believes that individuals should have the opportunity to experience a quality of life that reflects pride and accomplishment. Respect for person, acknowledgement of the dignity and rights of each person and confidence in each individual's potential are the foundations of service development.

Getting to know the Individual

Once the Individual has established support services with SASH, the Coordinator/Supervisor will begin the process of getting to know the individual in part by gathering information that is useful in the planning process. This is a collaborative process and when possible information which is comprised in this process should be completed in conjunction with the individual, the parents/guardian, natural/professional support persons. Many people who are referred to our services have been seen previously by one or more professional persons and/or have received a range of services before. Consequently considerable data is usually available. Where available, active use should be made of this material rather than subjecting the Individual and his/her family to the continual repetition of procedures as they move through the system of services. Getting to know the individual and gathering functional information may include the use of a variety of assessed tools. An Individual Support Profile will be developed as part of the support planning process.

Transition Planning

Whenever youth, adults, or seniors who access SASH supports and services, shows an interest in pursuing/transitioning from one support area to another within SASH, a meeting is arranged to further explore the individual's goals and interests, explain our supports and services, complete any further information as needed and provide tours of the support areas. If an individual desires to transition to any of these areas or is seeking other supports due to changes to their health, employment changes, retirement, etc. and if there is capacity in the desired service area and appropriate funding is in place, a meeting will be arranged to discuss the specifics of transitioning to these supports. The **Director of Individual supports will** provide communication between PDD, other service providers and the family network to ensure a smooth transition process. A desire to transition to other types of services or activity areas i.e. seniors, leisure or recreation, work based, or community based supports would be discussed as part of our support planning process. A meeting would typically be held to review services and see if changes need to be made according to the desires of the individual. The supports team would develop a **transition plan** based on the individual in order to transition as slowly or as quickly as services and supports can accommodate the transition/service change.

2) Outline of the Support Planning Process

Overview

The Support Planning Process will result in SASH developing outcomes based **goals for each service area the individual is supported** (My Support Plan-Individual Support Plan goals). **Priority is given to the outcome areas that reflect the person's goals, relevant major life activity areas, and exceptional medical and behavioral support needs. The MSP-ISP goals will identify support strategies and the responsibilities of the support team to achieve the goals. PDD criteria will be used in part as a planning tool and guideline for goal development.** The process described below outlines the key steps to developing **the goals**, once the individual has established support services with SASH. **The goals** will be flexible and change as individual needs change. SASH's focus will be to encourage community involvement and community inclusion in order to facilitate increased independence and growth.

Pre-Planning Meeting

Prior to setting up the planning meeting, **the SASH Planning lead and support team** will begin to gather and review information to prepare for the meeting. The individual will have been receiving SASH supports for three months prior to this step. This time frame will allow for vital data and documentation reporting. Being prepared will set the stage for a successful planning meeting.

Conducting the Planning Meeting

The Planning meeting will include the individual, the **SASH Support team and the individual natural supports (including but not limited to family members)** and/or guardian.

The **SASH planning lead** will facilitate the meetings. While agendas may vary all the meetings will include the following:

- Welcome and introductions
- Explain the process
- **Review last reporting period goal and outcomes**
- **Present new goals showing how the quality of life framework can positively affect many aspects of the individuals life**
- **Identify who will be involved in implementing the goal and any support strategies**
- Time lines to review and discuss follow up meetings

Discussions will be made to decide how often goals will be reviewed and will end with assignments being made to carry the plan forward.

Preparing the My Support Plan/Individual Support Plan.

When the Support Plan meeting has been completed, **the SASH Lead will take** all detailed information from that meeting and develop MSP- ISP **goals**. This document will outline the individual's goals to be achieved, the strategies required to provide the services and meet the identified goals, the outcomes and measures that determine how the **goals** are being met. Depending on the individual's strengths and needs areas there may be **accompanying** documentation. Any changes made to the **goals** must be identified to the person needing supports and consent received from the guardian prior to implementation of the changes.

The MSP-ISP **goals** will be reviewed at least annually and may be reviewed more often as the need arises or is desired. The MSP-ISP **goals** will be **entered into ShareVision (online workspace software for individual program goals and outcomes)** circulated and implemented within 30 days of the planning meeting.

Reporting and tracking documentation will be outlined in the MSP-ISP goals as well as the responsibilities of the SASH support team and anyone else actively involved in the goals implementation. Review meetings will be scheduled as needed to continue to monitor and make necessary changes to the **MSP-ISP goals**

Review Meetings

Subsequent review meetings will be held for each individual as required. Meetings will be held at least annually to review the individual's progress towards goals and outcomes, any proposed new goals. The reviews will ideally identify who is involved in the development of the MSP-ISP goals. A review meeting may be requested at any time by the individual, his/her parent or guardian. The MSP-ISP goal summary outcome will be used to review the progress and to develop or create new goals.

Emergency Review Meeting/Intervention

An emergency review meeting or Intervention will take place when there is a break down in the Plan due to the severity of the client's behavior. If a Restrictive Procedures Support Plan is identified as being necessary from this meeting and/or reviewing the recorded and reported documentation, this is brought to the attention of the SASH Behavioral Specialist the SASH Individual Rights Committee. All necessary documentation will be reviewed and a plan developed. The plan will be written by the SASH Behavioral Specialist and will need approval by the Committee, the plan must include:

- The identified behavior
- Positive approaches that will be used to increase appropriate behavior
- Reinforcement
- Guidelines for use of plan
- Data collection,
- Follow-up as required

Guardian consent will need to be obtained prior to implementation of the plan. The plan will be discontinued as indicated in the plan. (See SASH Individual Rights Manual).

The Plan will identify any reporting and tracking documentation as well as the responsibilities of the SASH support team to implement the plan.

Key Steps Summary: Support Planning Process

PRE-PLANNING MEETING



CONDUCTING THE SUPPORT PLAN MEETING



**PREPARING THE MY SUPPORT
PLAN/INDIVIDUAL SUPPORT PLAN GOALS**



REVIEW MEETINGS

3) My Support Plan- Individual Support Plan Goals



SASH Disability Support Services Individual Goals

Individual:

Program Code/s: 1010 1020 1030 1040 1050 2020 2021 3000

Reporting Period Start Date: DD/MM/YYYY

Reporting Period End Date: DD/MM/YYYY

Individual's Support Plan Goal:

My Support Plan Objective:

Frame Work Domain: Physical Well-Being Emotional Well-Being Material Well-Being Personal Development
 Self-determination Rights, Social Inclusion Interpersonal Relationships

Support Needs: Monitoring Prompting Partial Physical Full Physical

Who is Responsible: Individual Staff Support Home Respite home Practitioner Supervisor
 Coordinator Guardian Funds Administrator Trustee

Review Time Line: Monthly Quarterly Annually Other _____

Support Strategies:

Completion Date

Outcome: Met Not Met

Outcome Summary:

Created at DD/MM/YYYY by:
Last modified at DD/MM/YYYY by:
Content Type: Individual Goals
Version 2.0



Individual Service Agreement *with:* _____

Term of Agreement: _____ **to** _____ **Type of Service:** _____

Roles and Responsibilities: What will the roles and responsibilities for yourself and the Service Provider be to communicate and jointly monitor your services?

Service Provider Roles and Responsibilities

- SASH will obtain consents and decisions from the guardian as per the areas of Guardianship outlined in the specific Guardianship Order in place with respect to the Individual.
- SASH will ensure client confidentiality is maintained at all times.
- SASH will provide qualified and adequate staffing according to the budget.
- SASH will provide administrative, consultative, and support service to staff serving this individual as per agency policies.
- SASH will provide relevant supervision and training (i.e. First Aid, CPR, CPI, and Medication Administration) to staff serving this individual.
- SASH will ensure that all programs are in compliance with CET Standards.
- SASH Staff and Contract Providers will complete applicable Outcome based Service Delivery Reporting and Tracking Documentation

Individual/Guardian Roles and Responsibilities

- The guardian consents and decisions according to the powers and authorities granted in the specific Guardianship Order related to this individual.
- The guardian will be involved in planning, reviewing, and advocating for this individual as per the specific guardianship order for the individual.
- The guardian will provide feedback the quality of service being provided to this individual.
- Meetings regarding the services provided to the individual will be attended (when possible) by the guardian.
- The guardian will seek input from SASH in the making of related guardianship decisions for the dependent adult.
- If concerns arise about the quality of service being provided, the individual and/or guardian will discuss them with the Executive Director of SASH.

Funds Administrator Responsibilities

- a. The Funds Administrator will be responsible for monitoring the payment for services, and ensuring Payment is made in a timely manner (if under individualized funding).
- b. All billings, invoices, and payment requests will be sent to the trustee (if applicable).
- c. The individual's finances will be administered by : check applicable
 - i. AISH Funds administrator
 - ii. The Guardian/Trustee
 - iii. The individual independently
 - iv. Public Trustee
 - v. Other

Billing and Payments:

- a. PDD will make payment for services directly to SASH as outlined in their service contract. *OR*
- b. In the case of Individualized funding, SASH will issue an invoice to PDD for services rendered.
- c. Transportation Costs will be invoiced to the individual or trustee each month as agreed upon.

Change:

What is the process if you require and agree to a change (or termination) in the type of service or an increase in the number of units of service?

The service provider is required to provide a Change request with your permission for PDD approval.

- This agreement can be terminated by the service provider or the guardian with thirty days' notice in writing. In the event of negligence or risk to the individual's health or safety, no notice will be required. This agreement can be changed at any time if agreed upon by both the Service Provider and Individual/Guardian
- Conflicts will be resolved through meetings, including the guardian, the individual, the executive director of SASH, and the person/s involved (to be scheduled within one week of the conflict). In the event a conflict cannot be resolved in this meeting, it will be brought to the SASH board for a final decision.

Individual Receiving Supports and/or Legal Guardian Approval:

I have participated in the review and planning process of the Individual Service Plan. If changes to this plan are required, I will be notified of the change and the reason for it. Any changes to the goals require my signed consent.

Client Services Policies and Procedures Review:

Individual Rights and Responsibilities reviewed.

Initial _____

Policy: SASH's services will insure that all basic human rights are equally available to all. SASH is committed to protecting the rights of individuals receiving assistance. It is expected that all employees respect the rights, dignity and worth of all persons supported by the agency through their adherence to existing legislation and the agency's policies and practices.

Appeal process reviewed.

Initial _____

Policy: Any individual or legal guardian has the right to appeal as decision which significantly affects the individual or his/her services: to make formal complaints or to bring forward allegations of wrong doing when they feel sand individual has been dealt with inappropriately. Any individual who, for any reason, feels unfairly treated by SASH will have the right to seek redress through an established Appeal Process.

Advanced Care Planning/Personal Directives

Initial _____

Policy: SASH supports and recognizes the right of individuals either directly as an independent adult, (or through an appointed legal guardian), to make informed decisions about their current and future care and to actively participate in this process. Providing health care services and supports to individuals who attend SASH supports is a shared responsibility among SASH employees, individuals, guardians, and health care professionals.

(Legal Guardian Name)

(Legal Guardian Signature)

(Date)



Individual Support Profile

This is a confidential SASH document. The information in this document is for SASH Support Purposes and can only be shared at the discretion of the Supervisor and/or Coordinator.

Please use month and year when noting important dates.

Individuals Name: _____

SASH Start Date: _____

Specialized or Recommended Training

Protocols, AT& EI, Tracking Reporting & Checklists

Shift Summary

Residential / Home Living

Community Access/ Outreach/ Employment/ Recreation

Medical & Health

Transportation

Communication & Social Skills

Other/ Personal History

Updated: _____

4) Filing System (Main File, Working Binder) & Documentation

Main File

Each individual receiving supports will have a Main File that reflects all major action plans and events that occur while the individual is receiving SASH services. This file will also accurately reflect the individual's needs and goals to date, and the work in progress.

Individual Main File
Archive
Intake
Reporting & Tracking
Protocols, AT & EI's
Individual Information Sheet
MSP-ISP- Active Goals
MSP-ISP- Inactive Goals
Goal Progress summaries
Incident Reports- Signed
Contact Notes
Consents- Signed
Medication/Medical Profile
Individual Support Profile

Working Binder

Each SASH Team member who is identified in the MSP-ISP-goal support strategies will have a "Working Binder" The Working Binder is a file used to record and report data needed for the support planning process and serve as a guide for tracking and reporting the appropriate data. All documentation will be submitted as outlined in the MSP-ISP goal support strategies. The Individual Working Binders are in a secure location where access is controlled and limited for only relevant SASH personnel. The working binder will include but not limited to:

- Individual Information Sheet
- Individual Support Profile
- Planning documents- MSP-ISP Goals, Protocols, AT & EIs
- Medical- Medication/ Medical Profile , Medication Administration Record (MAR), Medical Appointment Record
- Tracking & Reporting Documents- specified in the MSP-ISP Goals and/or in the Individual
- General staffing information- Shift expectations, timesheets, mileage, weather closer, Emergency On-Call. Incident reporting information, HR file requirement

Documentation

Main File Documentation & Forms

1. Individual Information Sheet

Completed at initial intake for each individual receiving support services. This form will require all fields to be completed in full and noted in the field (n/a) when not applicable to the individual. And updated as needed

2. Individual Support Profile

This document provides is completed at intake which provided detailed support need information, is utilized to orientate new staff to the individual and needs to be updated when any support needs change.

3. Planning

MSP-ISP Goals & Service Agreement - Completed within 90 days of receiving SASH Supports
The MSP-ISP Goals will identify what documentation will be used to track and report goal outcomes as well as the SASH Team member that will be responsible for reporting, reviewing and recording these outcomes. Updated as needed or minimally at the individual's annual planning meeting.

Protocols, Assistive technologies & Environmental Interventions

To be identified at intake and completed as needed and per SASH policy.

4. Medication/ Medical Profile

Completed at initial Intake and updated as needed and/or when an individual has been prescribed medication. Information to be included:

- Name of individual
- Allergies, reaction, response
- Regular and short term medication
- PRN medication
- Date prescribed medication, dose and time of each

5. Legal Guardian Consent Forms-(5.Pages)

To be Completed at initial Intake and updated annually and Include consent for:

- Release of information**
- Consent for unsupervised time**
- Consent for Video & photographic Recording**
- Consent to Transport**
- Consent for Emergency Restrictive Procedures**
- Consent for Non-Emergency Treatment** (over the counter medications that should not be given)
- Consent for Annual Medical Assessment**
- Consent for Medical Appointments**
- Consent for Medication/ PRN**
- Agreement of financial Responsibility**

6. Tracking & Reporting

Support Summaries & Goal Progress Tracking

To be completed as outlined in the MSP-ISP Goal support Strategies. All accompanying tracking and reporting documentation will be identified in the support strategies and may include but not limited to:

- Meal planning
- Cleaning & chores
- Personal Hygiene & Bathing
- Lift & transfer
- Tube feeding
- Daily support needs
- Monthly calendar
- Seizure tracking
- Behavior tracking
- Physio
- Petty cash & finical

7. Unusual/Critical Incident Report

To be completed each time there has been a medication error Omitted Dose, or Incorrect; Person/Time/Does/Medication/Method, a behavioral issue, medical emergency or anything (critical) out of the ordinary occurs. The Coordinator/Supervisor and Guardian are to be notified within 24 hours of the incident occurring. If there is allegation of abuse the information is to be reviewed by the Executive Director

8. Medical/Dental Report

To be completed each time that an individual is seen by a doctor, dentist, psychiatrist, etc. It outlines why the appointment was required, recommendations and findings from the doctor, any medication changes and the date of the next appointment

9. Medication Sign Sheet(MAR)/PRN Sign Sheet (if applicable- see consents)

To be completed when an individual is on prescribed medication and requires SASH staff to perform the responsibility of medication administration. When a PRN medication is prescribed this will be recorded on the PRN Sign Sheet when administered.

10. Contact Notes

To be completed when contact is made with the individuals support network; when relevant or important information is exchanged regarding the individuals support services. Information Included: who was contacted, date and time and details about the contact.

11. Guardian Verbal Consent Contact – To be completed when consent is needed for reasons outside the main consent forms on file- contacted for consent will include:

- Date & time
- Individual or legal guardian
- Consent for (describe)
- Comments/suggestions by legal guardian
- Consent yes/no
- Initials of support person