

***SELF/FAMILY MANAGED CARE
FOR ADULTS WITH DISABILITIES
AND SENIORS
ELIGIBLE FOR HOME CARE***

**MANITOBA HEALTH / REGIONAL HEALTH AUTHORITIES
HOME CARE PROGRAM
OPTION**

INFORMATION GUIDE

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French Language Information Available on Request

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INTRODUCTION

In 1991 the Manitoba Government, through its Home Care Program, initiated a two-year pilot program that was based in Winnipeg. Twenty-nine persons were given the funds and full responsibility to demonstrate how they would be able to meet their own personal care and household maintenance needs by hiring/firing, directing and managing their own staff. As a direct result of the success of this project, in December 1994 the province wide expansion of the Self Managed Care Program option was approved. Within the year, Manitoba Health, through the Home Care Programs of the Regional Health Authorities, developed a Family Managed Care Program option to meet the growing needs of families. To strengthen their function, the two programs were united to form the Self/Family Managed Care Program option.

The Manitoba Government has contracted the Independent Living Resource Centre (ILRC) to:

- Provide support to consumers/families who are interested in pursuing the Self/Family Managed Care Program option.
- Respond to inquiries about the program; offer information and referral, written materials and manuals, and “Self/Family Manager” training.
- Facilitate learning through individual consultations, workshops, and videos.
- Facilitate opportunities for “networking”, so that Self/Family Managed Care Program participants may share their experiences.

WHAT IS SELF/FAMILY MANAGED CARE (SFMC)?

In Self/Family Managed Care, the consumer/designated family member accepts full responsibility for meeting his/her personal care and household maintenance needs by coordinating, managing, and directing those non-professional services assessed as needed to maintain an independent, community living lifestyle. The person who agrees to undertake the self/family managed care option will be fully responsible for designing a system of personal assistants to meet need which would otherwise be met through the services provided directly by the Home Care Program.

TERMS OF THE SELF/FAMILY MANAGED CARE OPTION

- Eligibility for the Home Care Program must be established.
- The consumer and, in the case of Family Managed Care, the designated family member are required to sign the agreement which indicates the consumer’s desire to be in the program.

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TERMS OF THE SELF/FAMILY MANAGED CARE OPTION (cont.)

- Assessment of need and establishing approved units of service (assessed hours) will be the responsibility of the Home Care Program.
- The payments made to consumers/family members to purchase the personal assistance required by consumers will be based on a comparable cost to the government for providing these services. The Home Care Program Regional Health Authorities offices will accept applications. The Independent Living Resource Centre has been contracted to assist in the implementation of this option.

BASIC FEATURES

- a) Persons who become Self/Family Managers will receive payment in lieu of direct non-professional services following a formal application assessment and a signed agreement with their Regional Health Authority.
- b) The amount of payment will be determined on the basis of an assessment by a Home Care Case Coordinator. This assessment will determine the quantity and type of service needed. This assessment will be according to the standards applicable to the Home Care Program.
- c) The Self/Family Manager will arrange to meet their needs/the needs of the consumer in the manner most appropriate to the circumstances.
- d) Reassessment will be conducted on a regular basis by Regional Health Authority Home Care staff; at the request of the consumer/family member; or when the assistance required by the consumer changes. This will enable adjustments to be made as the need for services increases or decreases.
- e) The decision to withdraw from Self/Family Management will be left with the consumer/family manager, subject to a reasonable period of notice. However, in the event of direct violation of the contractual agreement, the right to stay with the Self/Family Managed Care Program may be terminated.
- f) The responsibility of ensuring backup service will be left with the Self/Family Manager. During the first year, until the Self/Family Manager has established an emergency backup service, the Regional Health Authority Home Care Program Attendant Services may be requested to provide the required backup assistance. There will be a charge for this service. The rate charged will be equivalent to the rate payable for assessed personal care.
- g) All Self/Family Managers will be required to set up and maintain a separate bank account. This account is used solely for receiving and expending Self/Family Managed Care funds and will be subject to audit reviews by Regional Health Authorities.

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WHAT STEPS ARE INVOLVED IN BECOMING A SELF/FAMILY MANAGER?

The decision to opt for Self/Family Management requires considerable thought and planning. On receipt of your application, and prior to acceptance into the program, your Home Care Case Coordinator will conduct an assessment of the required care. Acceptance into the program may result in a change of Case Coordinators; not all Case Coordinators are involved in the Self/Family Managed Care Program option.

HOW DOES A CONSUMER GET ACCEPTED?

The Regional Health Authority Home Care Program staff in your area will review applications as they are received. Approval will be based on the general eligibility criteria. Applicants will be notified when a decision has been reached.

Following acceptance to the program you may need assistance in getting set up. The Independent Living Resource Centre has Independent Living Consultants (ILCs) who are qualified to answer your questions. The ILRC offers an introductory workshop, SFMC how-to manuals, peer support groups, and one-to-one consultations. You can contact the ILRC at (204) 947-0194. Rural consumers can call the toll free number at 1-800-663-3043 for the name of the ILC in your area.

Your Case Coordinator also is a source of knowledge as you begin your journey in Self/Family Management. Your assessment will be reviewed with you on a regular basis. You may request a reassessment if you feel your needs and/or living circumstances have changed. The Home Care Program's usual review/appeal processes will apply if you disagree with the assessment.

WHERE DO I GO FROM HERE?

After your application has been processed and you have been approved for Self/Family Managed Care, you will be required to sign a formal contract. This contract outlines the responsibilities of the Regional Health Authority, as well as your responsibilities. A sample of this document is enclosed with this package.

The Regional Health Authority will provide payments to Self/Family Managers based on the following allowances. Each Manager will need to develop his/her own individual budget, utilizing these funds in accordance with the contract. Be aware that your care expenses will differ from these allowances.

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- a) **Assessed Hours:** Payments to Self/Family Managers are based on the assessed units (hours) of service. Money for the purchase of these units will be paid to you, in advance, by direct deposit to your SFMC account. The deposits will be made biweekly and will be calculated as follows:
- ◆ For each assessed unit (hour) of household maintenance activities you will receive \$13.58;
 - ◆ For each assessed unit (hour) of personal care services you will receive \$19.81.

NOTE: These income factors of \$13.58 and \$19.81 are NOT WAGES.

These amounts are used to calculate your salary scales and payroll budget. Please refer to the enclosed BUDGET PAYROLL PLANNING for details.

- b) **Contingency Services:** These are additional service times required as a result of unexpected health needs arising from occurrences such as brief illness or personal care accidents. Up to two hours per month will be allowed. You will need to provide reasons for this additional time. Reimbursement for this time will be provided. If you require extra time on a regular basis, your Case Coordinator will review this need with you.

- c) **Transportation Allowance:** These funds will be provided to the Self/Family Manager on request. The following guidelines will apply:
- ◆ For the first assessed visit per 24-hour day, no transportation allowance is provided.
 - ◆ Where SFMs find it necessary to pay for Employee Transportation
 - a) In Winnipeg region – for all assessed visits following the first visit per 24-hour day, an allowance of the round trip bus fare equivalent will be provided
 - b) In other regions – for all assessed visits following the first visit per 24-hour day, mileage will be provided for the first 10 km.

Until a regular pattern of use is established, the payment for transportation will be retroactive. Once a pattern is established, payment for transportation will be made in advance.

Note: In regions outside of Winnipeg, Self/Family Managers should contact their Case Coordinator to determine the formula for calculating the transportation allowance in their area.

- d) **Emergency Backup:** During the first year you may request assistance from the Regional Health Authority Home Care Attendant Service in the event of an emergency. The use of the Attendant Service will enable you to have emergency backup services until your own backup plans are in place.

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d) Emergency Backup (cont.): You will be charged for the use of this service. The charge will later appear as a deduction on your payroll direct deposit statement.

e) Employee Recruitment, Training, and Payroll Administration:

As an employer, you will have to pay for certain employee related expenses. The following formula will be used to establish the “number of employees” for the purpose of calculating training, recruiting, and payroll administration allowance. This may not reflect your actual number of employees. It only determines the number of employees for Home Care funding allowances based on:

⇒ Up to 20 assessed units (hours) biweekly = 1 “Employee”.

⇒ Between 21 and 40 assessed units (hours) biweekly **or** over 40 assessed hours biweekly, within a 5 day period per week = 2 “Employees”.

⇒ Over 40 assessed units (hours) biweekly, within a 6 or 7 day period per week = 3 “Employees”.

HIRING: An allowance for the cost of recruiting staff will be provided to you on the following basis – for your first time recruitment, \$25.00 will be provided. This is intended to defray recruiting and advertising costs encountered. If required, the same rate will be authorized for a further two recruitments per year. The Independent Living Resource Centre, in addition to your local Canada Employment Centre, may be able to assist you with recruitment.

TRAINING: It is expected that you will provide most of the training for your staff. For training that you cannot provide, an allowance for training costs may be provided. This allowance will be a maximum of eight hours pay per employee hired. You will need to provide a training plan to your Case Coordinator for approval prior to this allowance being paid.

ADMINISTRATIVE COSTS: Certain administrative expenses will be involved in being an employer and managing a payroll. An allowance of \$50.00 per year per approved employee will be provided. This disbursement is to cover specific expenses such as office supplies, postage, bank charges, etc. The amount will be paid in advance. You will, however, not be paid for your own time in undertaking your employer responsibilities. As an alternative you may want to consider a commercial payroll service for this purpose.

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Your Responsibilities as an Employer

You, as a Self/Family Manager, will be responsible for securing the necessary staff to provide the needs required. As an employer, you will need to ensure that your employees are suitably qualified and trained. You will be responsible for negotiating the terms and conditions of employment, paying salaries along with required benefits and deductions. You will need to be familiar with the applicable provincial and federal employment requirements, specifically relating to items such as wages, hours of employment, vacation time, Employment Insurance (EI), Canada Pension Plan (CPP), and Workers Compensation.

Note: Additional information is available regarding

- 1) the legal requirements associated with being an employer and
- 2) your financial record keeping requirements.
(Refer to Section 5(2c) of the Agreement.)

Insurance

To ensure that you and your household are adequately protected in regard to liability, you will be required to carry Employer Liability Insurance. This can be arranged as part of your homeowner or tenant insurance package. You will need to provide proof of coverage upon request.

Disruptions In Your Service

During any period of time where care will not be required for an extended period of time, such as an admission to hospital, you are asked to notify your Case Coordinator. Payments to you can continue for a period of up to 14 days to enable you to retain or give notice to your employees.

Vacations/Out-Of-Province Travel

Usually the Home Care Program does not provide any services to individuals outside the province. For persons on the Self/Family Managed Care Program, a maximum of 30 consecutive days may be permitted with no reduction in funding. Absences beyond 30 consecutive days will not be funded. You will be required to advise your Case Coordinator of any such absences.

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Professional Services

The Home Care Program will continue to assess and to provide any necessary professional services, such as nursing, occupational therapy, or physiotherapy, as may be called for in the Home Care Plan.

Any supplies and equipment generally received from the Home Care Program will still be available to you.

Records

As a Self/Family Manager you will be required to establish and maintain a separate **bank account** to be used for deposits and payments related solely to Self/Family Managed Care. Where possible, you will receive direct deposits from your Regional Health Authority. You will be required to keep up-to-date payroll records for each employee hired. A **Payroll Journal** is necessary as part of your employer responsibilities, as well as for taxation and audit purposes. All deposits and expenditures, relating to providing for care from this bank account, will need to be accounted for (with cancelled cheques, invoices, or receipts) and recorded in a **Bank Journal**.

Note: The Excel spreadsheet for the Payroll/Record Keeping is available on the ILRC Website @ www.ilrc.mb.ca or on CD by calling the numbers listed below. Assistance with your budget and/or setting up your record keeping files is available by contacting the ILRC (947-0194), or (1-800-663-3043), to arrange an appointment. You may also request a copy of the manual **For the Record: A Self/Family Manager's Financial Planning Manual** – designed to provide details around budgeting, wages, payroll record keeping and other financial employer obligations.

Exceptional Circumstances

Situations of an exceptional or unique nature, extending beyond the provisions of the terms and conditions allowed within the Self/Family Managed Care Program, should be discussed with your Case Coordinator. These situations will be considered within the current Home Care Program Policy. If you disagree with the decision, the Home Care Program's usual review/appeal processes will be available to you.

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Leaving the Self/Family Managed Care Program Option

If, for any reason, you (the consumer and/or designated family member) wish to discontinue participation in this program option, you have every right to do so. However, you are requested to give 30 days notice in writing in order that resumption of services from Home Care can be arranged. The Home Care Program also retains the right to terminate your contract. Under most circumstances, up to 30 days notice would be provided. However, in situations where serious violation of your contractual obligations occurs, termination may take place without notice. Whether you choose to withdraw, or are withdrawn, you may still be eligible to receive required services directly from the Home Care Program.

Closing Remarks

In conclusion, Manitoba Health and the Regional Health Authority are pleased to offer the option of Self/Family Managed Care to current clients of the Home Care Program. Individuals who have chosen this method of meeting their personal care and household maintenance needs strongly endorse this option.

If you have further questions about the Self/Family Managed Care Program and how it may work for you, contact your Home Care Case Coordinator, or speak with the Independent Living Consultant at the ILRC (947-0194), or (1-800-663-3043).

Note: This guide is for general information only. Please refer to the Self/Family Managed Care Contract as the legal document detailing the specific terms and conditions of participating in the Self/Family Managed Care Program option of the Manitoba Home Care Program.

Letter from a Manager

Dear Peer,

The Self/Family Managed Program gives you the opportunity to be in control of every aspect of your attendant and homemaking needs. As you begin this new journey, you may be experiencing doubts, fears, or insecurities; or you may still have many questions that have not yet been fully answered. This is to be expected.

My name is Alexandra. I am a Self-Manager under the Self and Family Managed Home Care Program. Initially, I heard about the program through a friend who was in the pilot project. Although she continuously encouraged me to become a Self-Manager, I was very hesitant. Challenged by numerous health problems, I was concerned that managing all the details would be too stressful. Where would I find staff? What if I took ill and failed to complete my payroll? Was I even capable of keeping proper records? The questions went on and on. Besides, I was very fortunate to have excellent workers through the regular home care system; therefore I saw no reason for change.

Several years later, in 1996, when the threat of a strike by home care workers arose, my Case Coordinator suggested that I apply to become a Self-Manager. I gave the idea careful consideration, which included reading available material, meeting with the Self/Family Managed Care Coordinator from the Independent Living Resource Centre (ILRC), and attending a Self/Family Managed Home Care Peer Support meeting at the ILRC, where I met other Managers. I decided to give it a try, with the understanding that I can return to regular home care should the need arise. My application was accepted.

At first, the responsibilities are somewhat overwhelming. Setting the wheels in motion...opening a separate bank account, obtaining a business number, developing your schedule and budget, interviewing and hiring staff, and the likes (as described in your introduction package). You are not alone! For the first year, Home Care will provide emergency staff backup. The ILRC has excellent manuals, which covers every aspect of Self/Family Managed Care. These are available to all managers, free of charge. Consultants are also on hand to answer any questions and assist you with getting started. Peer support can be an invaluable asset to assist you along the way. I urge all new managers to learn as much as possible from the resources at their disposal.

During my seven years as a Self-Manager, I am fortunate in having hired staff that have been recommended by trustworthy friends. My first two primary care givers have nursing backgrounds. My present primary aide and my weekend staff came to me with no home care experience whatsoever. I manage my own training for my staff, and have greatly enjoyed the benefits in doing so. My caregivers are eager, willing to learn, and flexible. We have an excellent working relationship.

One of the policies I follow when training my staff is to inform my aide of the reasons I request a task be completed in a certain fashion. I have found that she will better remember my system when she is able to understand how it meets my needs. For example, I insist that my clothing be put on right arm, left arm, then over the head. As it is customary for the majority of individuals to first place a garment over the head, especially when assisting someone, such instructions are very quickly forgotten. However, when I explain that this is the only way I can control my spastic arms from punching her, my aide is more likely to be attentive to my instructions. Often my directives seem very petty, such as filling my syrup bottle to the beginning of the neck, rather than to the top. Somewhere in the back of her mind she is thinking, "man, is she ever picky . . . what a pain"! However, her outlook changes when I explain that if the bottle is too full, the syrup ends up everywhere except my pancakes! This only causes me frustration and leaves a mess for her to clean up the next day.

Other Self-Managers, friends, and family have been critical about the casual way in which I treat my employees. I feel that I give them respect, consideration, encouragement, and praise. They also receive reprimand when warranted. In return I expect, and receive, respect, loyalty, and hard workers. My employees are there for me at any time whenever the need arises. I have been able to plan my schedule to encompass my personal care and household tasks, as well as accompaniment to medical appointments, shopping excursions, and other outings. On several occasions I have received extra hours temporary when recovering from medical procedures, allowing me to stay in my home rather than be admitted into the hospital. Yes, there have been rough spots along the way.

I am truly happy in my choice to become a Self-Manager. I have enjoyed the camaraderie of my peers. I have been actively involved in training and assisting other Self-Managers with their payroll, record keeping, reports, etc. It took me time to overcome my apprehension towards being a Self-Manager, but the benefits far outweigh the challenges.

All the best to you as you embark on this exciting venture! Remember, those of us who have gone before you, paving the way, are here to share our experiences with you. Do not hesitate to ask for a helping hand. You are on your way.

Perhaps, someday, our paths may cross. Until then...

My sincere regards,

Alexandra
Self-Manager