



# Service Manual and Service Standards

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Vision:

*People with disabilities are contributing, vital members of the community.*

Mission:

*Enhancing the quality of life for people with disabilities through innovative, personalized services.*

## A. SERVICE MANUAL

### 1. How do I get services at WIN?

- a) Pick up and fill out an intake package from WIN.
- a) Return finished application to WIN.
- b) Please note that WIN doesn't fund services, we contract with various government departments who do this.
- c) You must qualify for funding in order for us to consider if we can provide you services or not.
- d) WIN will process your application.
- e) WIN will contact you for an interview.
- f) Afterwards you will be contacted to let you know whether we can offer you services or not.

\*NOTE: If WIN cannot help you, we will try to find someone who can and we can assist you in the steps to do this.

### 2. What happens next?

#### **[Section 2a. Full Disclosure Policy:**

Before WIN accepts Individuals into service or in relation to changing services, applicants must comply with WIN's full disclosure policy.

It is very important that WIN have all the facts and information about the applicant so that support and services can be provided safely and effectively.

If the applicant does not comply with this policy, WIN may have to reconsider accepting the person into service.]

[Section 2b. Orientation .. to be scheduled within first week..



- a) The Executive Director will meet with you and your guardian (if you have one) to show you the programs and talk about your responsibilities and WIN's responsibilities. (See item #3 below.)
- b) Before services begin you will have a meeting with the Program Coordinator and the applicable funding coordinator to talk about goals and the help you want from staff.
- c) If you understand and agree to the responsibilities you (and your guardian) will sign the Services Agreement.
- d) You (and/or your guardian) will also sign the Individual Service Plan (ISP), a written plan of your goals.

3. What are my responsibilities?

You are responsible for following the program guidelines and expectations:

- a) Work on the goals you agreed to in the Services Agreement.
- b) Try your best to reach your goals.
- c) Attend appointments, meetings, etc.
- d) Provide information so WIN can serve you better.
- e) Be willing to try new things.
- f) Treat others with dignity and respect.
- g) Ask questions and let WIN know if you have any problems.

If you or your family have questions or concerns, go to your staff or team

leader.

- If you still have questions or concerns, go to your Program Coordinator.
- After this, if you still have questions or concerns, go the Executive Director.

4. What are goals?

- a) Goals help you become more independent in your daily life, at home, work, or recreation, and they can include activities you want to experience.
- b) Using a process called Person Centered Planning, WIN staff will:
  - Help you to identify your dream(s)
  - Help you to set goals to reach your dream(s)
  - Work with you on goals to reach your dream(s)
  - Help you decide whether to continue with your goals or set new ones each year.

5. Appointments and Schedule:

- a) It is very important you meet all scheduled appointments with WIN staff.
- b) If you cannot make an appointment, it is your responsibility to contact the staff early enough so he or she can change plans.
- c) Your support staff will review rules about missed appointments with you.
- d) You may be charged a fee for not providing enough notice for missed appointments and cancelled shifts.

6. Appearance:

- a) Good personal grooming and hygiene are encouraged.
- b) Keep clothes clean, neat, in good repair, and suitable for the type of appointment or activity you are involved in.
- c) Follow your employer's expectations when you are employed.

7. Personal Belongings:

- a) You are responsible for your belongings.
- b) WIN does not provide personal items and you are responsible for all costs.

c) Support staff may be able to help you find any items you need to buy.

8. Visitors:

a) At WIN:

- Appointments are for you, your guardian (if you have one) and your support staff.
- If you wish to bring someone to a meeting or appointment, it is your responsibility to make arrangements with your support staff ahead of time.

b) At work:

- Most companies have rules about visitors in the work place. You are encouraged to follow the company rules.
- Usually friends, family, guardians, etc., should not be visiting you while you are working.

c) At home:

- WIN has no say about who visits you at home.

9. Medications:

a) WIN will keep medical information about you.

b) If you take medications and need help your support staff can assist you.

c) It is your responsibility to tell support staff of any medications you are using, or if the medication is bothering you in any way such as stomach upset, rash, etc.

10. Fire and Safety: (WIN puts a lot of effort into safety and risk prevention)

a) Support staff will go over fire and safety procedures with you.

b) WIN will provide you with your first fire extinguisher and basic First Aid Kit.

c) Regular fire drills are set up and support staff will go over fire drills with you, showing you the emergency exits, and talking about any possible hazards or risks.

**\*NOTE: Immediately report all accidents and injuries to your support staff.**

11. Confidentiality:

- a) The law gives you the right to have your personal information respected and kept confidential.
- b) WIN follows all the laws that protect your personal information.
- c) WIN has a policy on confidentiality that all staff, board, and volunteers must follow.
- d) By law, WIN must have written consent from you or your guardian before any of your information (written, verbal), pictures, etc., can be shared.
- e) Sometimes information needs to be shared with other people or organizations to help provide you services. These people may include:
  - Someone from your funding source(s)
  - Your guardian (if you have one)
  - School personnel
  - Your Services Coordinator
  - Your doctor, pharmacist, dentist and/or other health care professionals
- f) Any information shared will be on a “need to know” basis.
- g) The people and organizations needing information will be listed on the Release of Information Form that you sign at the time of your Annual Planning Meeting and is updated yearly.
- h) If any other information needs to be shared, you will be asked to sign another Release of Information Form.

## 12. Personal Records:

- a) Your master file with all your original documents is kept at the WIN office.
- b) If you have residential services, a binder is kept at your residence.
- c) In your binder you will find the following:
  - Your personal profile
  - Medical information
  - Emergency contacts
  - Lognotes
  - Assessments, reports, goals, case conference information, etc.

d) Please let your support staff know if there are any changes to your personal information.

For safety, your birth certificate and social insurance number should **not** be kept with you. Talk to your support staff about a safe place to keep these items.

### 13. Finances:

- a) You and/or your trustee or a family member who assists are responsible for your finances.
  - b) Like everyone, you may be responsible for the following costs:
    - Food
    - Rent
    - Clothing
    - Personal items
    - Recreation and leisure
    - Travel
    - Other
  - c) If finances are identified as a goal in your Services Agreement, WIN staff will work on this with you.
  - d) Support staff can help you keep track of your account using a ledger and can you support to pay bills.
  - e) Because it is your money, you must be present during any spending (financial transactions).
- You should neither borrow money from WIN staff, nor lend, nor give them

money

14. Abuse and Sexual Harassment:

**WIN will not tolerate abusive behaviour from staff or any other person.**

a) What is Abuse?

- Any physical, mental, or emotional action that hurts you or makes you feel:
  - Uncomfortable
  - Scared
  - Taken advantage of
- This means that “NO ONE” is allowed to:
  - Verbally or physically abuse you – like yelling or hitting you.
  - Use restrictive procedures on you without proper permission.
  - Take away your rights or privileges.
  - Use harsh language like screaming, name calling or humiliating you.
  - Threaten use of force.
  - Let or encourage anyone abuse you.
  - Threaten to kick you out of a program to get back at you for reporting any reason [?]
  - Intentionally put you in a situation where you are at risk of physical or emotional harm.

b) What do I do if I feel I have been abused?

- If you ever feel that you have been abused, tell any of the following:
  - Support staff
  - Team Leader
  - Program Coordinator
  - Executive Director
  - A friend or family member
  - Someone you trust
- Whoever you tell within WIN will be responsible for helping you.

- You are encouraged to attend an abuse workshop that WIN provides.

c) What is sexual harassment?

- Sexual harassment is illegal
- Sexual harassment is any unwanted:
  - Sexual advances
  - Request for sexual favours
  - Verbal or physical contact of a sexual nature
- It can include things like:
  - Pinching, patting, rubbing
  - Dirty jokes
  - Pornographic pictures or materials
  - Comments, suggestions, requests, or demands of a sexual nature

d) What do I do if I feel I'm being sexually harassed?

- Tell the person to quit what they are doing or saying.
- Keep a record of this incident or any other incident. (You do not have to but it can be helpful.)
- File a complaint and report the incident to one of the following:
  - Support staff
  - Team Leader
  - Program Coordinator
  - Executive Director
  - A friend or family member
  - Someone you trust
- You also have the right to make a complaint with the Alberta Human Rights Commission or the Police.
- The person you tell will help you deal with the situation.



## 15. Concerns:

- a) It is your right to make a complaint or appeal a decision if you are having a problem with someone within WIN or are unhappy with a decision that has been made.
- b) If you have been hurt or if you believe that personal rights have been taken away, you should bring this up so it can be dealt with.
- c) What to do if you have a concern:
  - You can write your concern, use a recorded voice, or just verbally tell us about it.
  - Talk to the person that you have the problem with.
  - If the problem isn't solved, you should meet with the Team Leader.
  - If the problem still isn't solved, you can take your concerns to the Program Coordinator or Executive Director.
  - Please note that you are urged to go to the Program Coordinator or the Executive Director within 5 working days of your (unsuccessful) meeting with the Team Leader.
  - Explain the problem and what you did to try to solve it.
  - The Executive Director will investigate the complaint and meet with the people involved. This will be done within 5 working days of being informed of your complaint.
  - The Executive Director will make a decision and send it to everyone involved either in writing and/or on voice recording within 5 working days of the meeting.
  - If you are still unhappy, you may send your concern to the Board of Directors either in writing or on a voice recording. Ideally you would do this within 5 working days of the Executive Director's decision.
  - The Board will hold a meeting and invite all the people to give their story.
  - The Board will make a decision and send it to everyone involved either in writing and/or on a voice recording within 5 working days of the meeting.

## 16. How do services end?

### a) Services can end the following ways:

- You no longer want services from WIN.
- You are no longer assessed as having a developmental and/or physical disability.
- WIN cannot, for whatever reason(s), provide the support you require.
- What happens when services end?
- If you no longer want services from WIN, a one-month notice of ending services is required. If this is not provided you may get billed for related costs.
- If WIN is discharging you from services, we will send you a letter and invite you to a meeting to talk about this possible discharge.
- At the time of the withdrawal or discharge, you will be given the opportunity to meet and make any comments you choose.
- Your file will be kept and confidentiality will be maintained.

## 17. What are my legal rights and freedoms?

- Canada has laws that protect a person's rights and freedoms, for example the Canadian Bill of Rights and the Alberta Bill of Rights [See Appendix].
- No one can take away your rights and freedoms, unless ordered by a court.
- You cannot take away another person's rights and freedoms.

## 18. Protection of Information

- There are many laws that protect your personal information such as anything from your telephone number to your picture
- WIN cannot give anyone your personal information without your permission
- Even relatives like your parents cannot have information without your permission, unless they are your Legal Guardian
- Agencies and companies in Alberta can only take information needed to provide you service

- They cannot give out information without your permission
- They must allow you to see information they have collected
- They must allow you to change mistakes in your personal information

**\* Note:**

When filling out forms or being asked questions, it is important that you remember 2 things:

- 1) Why do WIN or other agencies and companies need it?
- 2) Who will see it?

If you do not understand why they want the information, ask questions.

If you are still not sure, ask another person like your support staff to help.

19. What is a Trustee or Guardian?

If you are an adult who cannot make reasonable personal decisions, someone may ask the court to appoint a Legal Guardian or Trustee to protect you.

- a) A trustee (e.g., a family member, a friend, or a trust company) looks after your financial matters.
- b) A guardian makes or helps make decisions about personal matters in all or some of these areas:
  - Health care
  - Where you live
  - Who your friends are
  - Licensing
  - Education and training
  - Social activities
  - Where you work

## **B. Service Standards (Role of support staff and WIN)**

### 1. General Principals:

- a) The focus is on each person becoming as independent and involved in all areas of their daily life as possible.
- b) People are also encouraged to develop new skills through experience, modeling, and specific training goals.
- c) Support staff at WIN assist (support) people in all aspects of their daily lives, based on their specific needs, program goals, support time, family involvement, and other support available.
- d) Depending on the person, support provided can include monitoring, verbal prompting, and partial to full physical assistance.
- e) Support staff will assist people in completing most daily chores, as needed. However, it is not the support worker's responsibility to do things the person is able to do but chooses not to. In these circumstances other means will be investigated, e.g., paid yard worker, housekeeper.
- f) The level of support, which is based on the person's ability and circumstances may change as new skills are acquired.

[The level of support may also change in such a way that increased support is needed (refer to WIN's Advance Care Planning Policy Employee Manual, Section 6.8)]

- g) Fading of support is expected as people acquire skills.

### 2. Residential Areas of support may include:

#### Personal Care

This includes but is not limited to bathing, shaving, brushing teeth, trimming nails, and arranging for haircuts.

#### Menu Planning

People are encouraged to develop healthy weekly or monthly menu plans following the Canada Food Guide. The plans help to achieve a balanced diet and reduce food wastage. Additional information can also be incorporated through doctor/dietician recommendations. The focus should be on nutrition, variety, likes/dislikes, and cost. If special or restrictive diets are required, they need the approval of the guardian, doctor, and Behaviour Review Committee. Staff can educate and encourage people, but cannot force compliance.

#### Grocery Shopping

Grocery shopping can occur once a month, once a week, or a number of times per

week depending on the needs/requests of each person.

Grocery lists are developed and may include visual symbols for increased independence. People are encouraged to participate in the entire process from selecting and placing the items in the grocery cart, putting the items on the conveyor belt, paying for them, taking the purchases home and putting them away. Minimally, people must be present when items are purchased.

### Cooking

Cooking for the person ranges from preparing meals for them, to assisting them in the process (getting necessary items, stirring, setting the table), to their full independence. Staff monitor for safety and safe food handling practices. People may use picture cookbooks (all steps are done visually) and specialized equipment (non-skid cutting mats, safety knives) to increase their independence and safety in this area.

### Housecleaning

People are expected to participate where possible in all areas of housecleaning needed to maintain a clean and healthy home. This includes but is not limited to:

- a) Dusting
- b) Vacuuming
- c) Washing dishes
- d) Cleaning bathroom
- e) Washing floors

This may also include monthly and annual cleaning such as:

- a) Washing walls
- b) Cleaning windows
- c) Cleaning cupboards
- d) Cleaning / organizing closets and storage areas
- e) Cleaning fridge
- f) Cleaning stove/oven

Staff members are not expected or encouraged to do housecleaning for the person; however, they must respect the limitations a person may have and therefore are expected to assist in the process. People are encouraged to continually develop new skills and independence in this area. If a person is unwilling to participate in cleaning, other arrangements may need to be arranged (e.g., cleaning service). The cost of this

service is the responsibility of the person and/or family. For example, when moving, it is **not** the support staff's responsibility to clean neither the place the person moved out of nor the new place to be moved into.

### Laundry

People are expected or encouraged to do their own personal laundry. Depending on the skill level of the person, this may range from putting items in the machines to full independence. Staff will monitor, provide verbal prompts, and assist where necessary. Skill development programs are often developed in this area to assist individuals in achieving independence.

### Yard work

People/families are responsible for yard work. Support staff can assist people in looking after flowers, vegetable gardens, cutting the lawn, and snow removal, if this is an interest or desire of the person and the person is actively participating in the activity. If a person is unwilling or unable to participate in yard work, an outside person/company will be hired to complete the duties. WIN can assist in locating and booking these services; however, the cost is the responsibility of the person and/or family.

### Financial

#### i. Budgeting

Westlock Independence Network staff can be involved in people's personal finances when the person or trustee deems that support is needed. All financial ledgers are kept current and can be reviewed by the trustee at any time.

WIN does not fund personal expenditures such as food, rent, clothing, personal items, recreation and leisure costs, etc. for the person receiving support. Where the person receiving support is a minor or an adult living with his or her parents, the parent/trustee is responsible to provide sufficient funds to cover the person's personal expenditures.

In emergency situations, e.g., lost wallet, alternative temporary financial processes may be negotiated on an individual basis. Staff should call the Team Leader or Executive Director for authorization.

#### **\*Staff should not loan money to people we support.**

People are encouraged to develop money management skills. Staff are available to assist each person in areas of financial management as needed.

A monthly budget, established by the person with staff support, reviewed, and approved annually by the trustee, shall provide a guideline for spending.

If the person incurs or anticipates any significant additional expenses, the

trustee/family will be contacted for approval.

ii. Financial Transactions/Ledgers

The person must be present whenever a financial transaction takes place. Special consideration will be given under rare and one time circumstances, e.g., people in a wheelchair out in the cold weather/lots of snow.

All financial transactions involving staff assistance must be documented with receipts, recorded in the appropriate record book, and initialled by the staff. Expenditures not usually receipted and involving staff assistance will be recorded in detail.

If the person's wallet ledger is out more than \$10.00, an incident report must be completed.

iii. Banking/Paying Bills

People will be encouraged to maintain and manage a chequing and/or savings account with staff support, as needed. Staff **cannot** be listed as co-signers on a person's account.

Documentation for all cheques written shall be kept and marked with the corresponding cheque number.

All cheques written shall be recorded in the record book. The amount of the purchase shall be added to the record book as soon as purchase price is known.

A bank transaction receipt shall confirm deposits/withdrawals to accounts. People who make their own deposits/withdrawals are asked/reminded to bring in the documentation. Receipts/banking slips are especially important when handling cash. The Team Leader or delegate is responsible for monitoring the bank statement reconciliation on a monthly basis.

Some individuals may choose to use debit cards. Trustee must be aware of this. PIN should change yearly.

In situations where staff are supporting people in managing shared expenses for groceries, household items, rent, utilities, etc., records will be kept (e.g., pooled money, petty cash funds, grocery funds, utilities).

Cash and record books that WIN is responsible for shall be kept in a locked box or cabinet.

Record keeping shall be meticulous so that staff can show accountability (e.g., in ledgers)

A person's bank statements, record books, and cancelled cheques are their own property. Originals may be kept and stored by WIN.

WIN will assist and/or inform people to follow all municipal, provincial, and federal regulations in the collection, reporting, and storage of personal financial records. WIN will have a qualified person review financial tracking yearly for each situation where

WIN staff are assisting in personal finances.

### Personal Shopping

Support staff are able to assist people with their personal shopping. This may include purchasing items such as shampoo, soap, clothing, or furniture. Staff will assist people in selecting items that are reasonably priced and of acceptable quality for the purpose. For larger items (i.e., items over \$100 each), assistance will be given to research alternatives and to do comparison shopping. When applicable, staff will communicate with families/guardians/trustees to gain input and direction. Shopping may occur in Westlock or in surrounding communities (e.g., St. Albert/Edmonton). People will have final decisions on the items they purchase.

### Medication

Staff can assist in the areas of medication delivery and appointments if required by the person/family/guardian. WIN employees are required to successfully complete Medication Administration training within the first 6 months of employment and every 2 years after. WIN staff follow strict guidelines regarding administration and documentation of medication. All breeches to this process are recorded on incident reports and monitored by the medication training team.

### Medical Appointments

Support staff are also able to assist people in making appointments, attending appointments, and completing necessary follow-up. Support staff are expected to update family and guardians regarding all medical concerns/appointments. Family members may choose to make and attend appointments with or without staff involvement, but would be expected to update staff on outcomes of those visits.

### Communication Skills

Support staff will assist people in developing or improving their communication skills, as needed. This may include using a picture or photo communication system, or electronic devices.

### Social Skills

Support staff will assist people in developing appropriate social skills if needed. This may include sexuality and relationship education.

### Community Involvement

People may be assisted and encouraged as needed in accessing community activities and events.

### Pedestrian Safety

People are expected to follow safe pedestrian and bike safety rules. Staff members are expected to model appropriate skills as outlined in our pedestrian safety training.



Details of pedestrian safety training are available upon request.

### Transportation

People are responsible for their own transportation and costs to and from meetings, appointments, employment, activities, etc. WIN can assist in looking into travel alternatives e.g. taxi, handi-bus, walking etc., and will work with people in developing the abilities to get to and from as independently as possible. Support staff may be able to transport people (See Services Agreement), if staff support is needed in the related activity. Prompt payment of travel invoices is required.

## APPENDIX

### 1. What is the Bill of Rights?

The Canadian Bill of Rights and the Alberta Bill of Rights protect your rights and basic freedoms for anything that comes under Canadian and Alberta Law.

The Alberta Government accepts and promises these rights and freedoms to all Albertans without being treated different because of:

- Race
- What country you were born in
- Color
- Religion
- Sex

### 2. What are my basic freedoms?

Basic freedoms help ensure your personal safety, allow you to enjoy your personal belongings, and give the right to not have them taken away, except by the court.

You have the right to be treated the same by the law and the law will protect the following:

- Freedom to choose your religion
- Freedom to speak out about what you believe in
- Freedom to meet and belong to any group
- Freedom of the press

### 3. What is the human rights, citizenship and multiculturalism act?

This act does not allow people to be treated differently because of:

- Physical disability
- Mental disability
- Age
- Ancestry
- Marital status
- Source of income or family status
- Sexual orientation

### 4. What is the Freedom of Information Act (FOIP)?

The act protects information collected by Alberta Government Agencies like:

- Persons with Developmental Disabilities (PDD)
- Schools
- Assured Income for the Severely Handicapped (AISH)

### 5. What is the Personal Information Protection Act (PIPA)?

The act protects information collected by all privately owned companies and agencies

in Alberta like:

- WIN
- Sobeys
- Telus

6. What is the Health Information Act (HIA)?

The act protects any medical information collected by your doctor, medical clinic, or hospital.