



Developmental
SERVICES

Passport Program

Guidelines for Adults with a
Developmental Disability and their Caregivers

Effective October 1, 2014



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Overview

The transformation of adult developmental services and supports is based on the overarching principle that people who have a developmental disability are members of the community and focuses on independence, dignity and self-determination. The fundamental vision is to support the full inclusion of Ontarians with developmental disabilities in all aspects of society.

Passport is a program that helps adults with a developmental disability be involved in their communities and live as independently as possible by providing funding for community participation services and supports, activities of daily living and person-directed planning. The program also provides funding for caregiver respite services and supports for primary caregivers of an adult with a developmental disability.

The key goals of the Passport program are to:

- Foster independence by building on individuals' abilities and developing community participation, social and daily living skills.
- Increase opportunities for participation in the community with supports that respect personal choices and decision-making, and help people achieve their goals.
- Promote social inclusion and broaden social relationships through the use of community resources and services available to everyone in the community.
- Help young people make the transition from school to life as an adult in the community.
- Support families and caregivers of an adult with a developmental disability so they can continue in their supportive role.

The services and supports funded under Passport are guided by the following principles:

Person-centred/directed – services and supports build on individuals’ strengths and are responsive to their preferences, needs and values.

Choice and Flexibility – individuals identify and participate in activities that are meaningful to them. Direct funding is available to give Passport participants more options in how supports are provided.

Strong Families and Caregivers - the individual’s family and personal support network is recognized as the primary support for adults with a developmental disability.

Fairness and Equity - funding amounts are based on a provincial application and needs assessment process and funding formula.

Accountability – individuals, families and service delivery agents must use Passport funding for its intended purpose and comply with spending rules and reporting requirements.

There are two payment options in the Passport program. Recipients can choose to manage their own funding to develop their own support arrangements and hire their own support workers and service providers. For those who prefer to receive supports from an agency, the Passport Agency can work with individuals and families to arrange payments with their chosen service provider(s). It is also possible to receive Passport funding through a combination of these two approaches.

Who May Receive Passport Funding?

Any adult who is eligible for developmental services and supports funded by the Ministry of Community and Social Services, including young adults who are 18 years of age and still in school, may apply for funding through Passport. Access to funding under the program is subject to available resources.

Individuals must contact the Developmental Services Ontario office (DSO) in their region to request these services. Once an individual's eligibility has been confirmed and they have completed the Developmental Services Application Package, their information will be transferred to the local Passport Agency.

For more information about applying for developmental services for adults with a developmental disability contact the local DSO office or visit www.dsontario.ca

What Supports Does Passport Funding Cover?

The Passport program is designed to complement and work together with other government programs, resources and sources of funding to provide a wide range of supports. Passport funding can be used for the following services and supports:

- Community participation
- Activities of daily living
- Caregiver respite
- Person-directed planning (up to \$2,500)
- Administration of Passport funding (up to 10% of Passport allocation)

Services and supports may be purchased from the following types of service providers:

- Community service providers
- Developmental services agencies
- Private service and support providers
- Adult education providers
- Personal support workers
- Neighbours, family members, friends

Passport funding may be used to compensate certain family members to provide services and supports - however it cannot be used to compensate:

- Primary caregiver(s) regardless of residence
- The spouse of a person with a developmental disability regardless of residence
- A child under the age of 18

The types of services and supports included under the admissible and inadmissible expenses sections that follow represent the intended use of Passport funding.

Definitions

Community Participation Services and Supports

Under the Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act, 2008 (SIPDDA), community participation services and supports means:

“services and supports to assist a person with a developmental disability with social and recreational activities, work activities, volunteer activities and such other services and supports as may be prescribed.”

Community participation can involve many different areas of life such as work, leisure, and being involved in the community. The purpose of community participation services and supports is to enable adults with a developmental disability to be involved in activities in the variety of settings that make up community life and to develop a growing network of personal relationships.

Activities of Daily Living Services and Supports

Under SIPDDA, activities of daily living services and supports are defined as:

“services and supports to assist a person with a developmental disability with personal hygiene, dressing, grooming, meal preparation, administration of medication, and includes training related to money management, banking, using public transportation and other life skills and such other services and supports as may be prescribed.”

Activities of daily living involve tasks for self-care and the various things people do in everyday life, from using the telephone to cooking to navigating the public transit system. The purpose of activities of daily living supports is to provide supports to adults with a developmental disability that enable them to live as independently as possible with their families. This can be in shared living situations or on their own.

Caregiver Respite Services and Supports

Under SIPDDA, caregiver respite services and supports means:

“services and supports that are provided to, or for the benefit of, a person with a developmental disability by a person other than the primary caregiver of the person with a developmental disability and that are provided for the purpose of providing a temporary relief to the primary caregiver.”

Caregiver respite services and supports are intended to give primary caregivers a mental and physical break from their caregiving responsibilities.

A primary caregiver is the main person who takes responsibility for the support and care of an adult with a developmental disability; he/she may or may not be related to or live with the person who has a developmental disability. The designation of primary caregiver extends to the spouse of a primary caregiver.¹

Person-Directed Planning Services and Supports

Under SIPDDA, person-directed planning services and supports means:

“services and supports to assist persons with developmental disabilities in identifying their life vision and goals and finding and using services and supports to meet their identified goals with the help of their families or significant others of their choice.”

¹ For the purposes of the Passport program, an individual or family who is receiving financial compensation from a Ministry-funded agency for the support of an adult with a developmental disability (e.g., Host Family provider, Adult Protective Service Worker) is not considered a primary caregiver. An individual, family or service provider who is receiving financial compensation to provide residential arrangements, supports or care for an adult with a developmental disability is not considered a primary caregiver under the program.

Admissible Expenses

The following types of services and supports are examples of what Passport funding may be used to purchase:

Community Participation Supports and Activities of Daily Living

- Programs, classes, camps, and supports that foster and develop independence, social, communication and life skills (e.g., literacy, cooking, banking and managing money, using public transportation, computer skills, decision-making, self-advocacy, assistance with self-care). This includes associated fees and supplies
- Recreation, leisure, social, cultural and athletic activities that enable opportunities to participate and join in community events and activities (e.g., club memberships and fees, admission to festivals, museums and sporting events, fitness and sport/activity-specific lessons)
- Pre-employment and employment supports (e.g., skills, task and routine training, job coaching)
- Transportation to/from activities (e.g., local transit, mileage, taxis)*
- Hiring a support worker to provide assistance with community participation and activities of daily living

- Out-of-pocket expenses incurred by support workers while providing support (e.g., cost of meals, transportation and activity fees, expenses incurred accompanying the individual with a developmental disability during trips and holiday travel)*

***Note:** The Ministry recommends that Passport recipients use the expense limits set out in the government of Ontario's Travel, Meals and Hospitality Directive for government employees as a guide for support workers' expenses. The Directive may be viewed at: ontario.ca/bxhx

Person-Directed Planning

- Passport funding can be used to purchase supports to develop a person-directed plan that builds on the individual's strengths and interests and identifies the supports needed to achieve their goals.
- Person-directed planning services and supports may be purchased from independent planners and facilitators or developmental services agencies.
- Passport recipients can use up to \$2,500 of their annual funding to purchase person-directed planning services and supports.

- The Ministry has worked with families and experts in the field of person-directed planning to develop a Guide to Person-Directed Planning. The Guide is available on the Ministry's website at: ontario.ca/bxkr.
- Additional person-directed planning resources are also available online. The Ontario Independent Facilitation Network is a provincial network whose purpose is to inform, educate, encourage, support, link and promote independent facilitation and planning in Ontario. Information and resources to support person-directed planning are available on their website at: www.oifn.ca

Caregiver Respite Services and Supports

The primary goal of caregiver respite services and supports is to help caregivers meet their own needs and support a healthy relationship between the person receiving care and the caregiver.

Examples of caregiver respite services and supports include:

- Help for the person with a developmental disability with activities of daily living such as personal care needs.
- Supervision of the person with a developmental disability.

Caregiver respite services and supports may last from a few hours to overnight. They may be provided during the day, evening or weekend and can be received either in-home or out-of-home.

Administrative Supports

- Some individuals who choose to manage their funding may need help to coordinate their supports or they may need help with administration. Up to 10% of the total Passport funding may be used for administrative supports (e.g., bookkeeping, payroll, scheduling support workers, bank fees for Passport-dedicated bank accounts).
- Passport funding may also be used to cover applicable employer costs (e.g., Canada Pension Plan, Employment Insurance and Workers Safety and Insurance Board premiums, vacation pay).

Inadmissible Expenses

Passport funding may not be used to purchase the following types of services and supports:

- Indirect respite services and supports (e.g., cleaning, meal preparation, snow removal, care of other family members)
- Tuition for post-secondary education/degree programs that are eligible for government student assistance programs such as the Ontario Student Assistance Plan; supports that are available through an on-campus accessibility office
- Items for which the individual receives an allowance from the Ontario Disability Support Program (e.g., drug benefits, medical aids)
- Housing and home maintenance (e.g., rent, home purchase or mortgage payments, repairs, renovations or modifications, housekeeping, yard work)
- Groceries, food, and restaurant meals for the individual with a developmental disability
- Clothing
- Household items and electronics (e.g., furniture, appliances, televisions, computers)
- Telephone/telecommunications (e.g., home telephone and internet service, cell phone and service)
- Holiday travel (e.g., personal or family vacations, accommodation, transportation, travel insurance)
- Dental care and services
- Fees for therapies/specialized services (e.g., speech and language, physiotherapy, occupational therapies, nursing, massage)
- Personal goods and services (e.g., toiletries, spa treatments, aesthetic and cosmetic services)
- Assistive devices and specialized equipment
- Vehicle purchase and/or modifications, leases and rentals

Extenuating Circumstances

Community Participation and Activities

of Daily Living: The Passport Agency has authority to exercise discretion and approve the use of Passport funding for community participation and activities of daily living supports or expenses that are not normally allowed under the program. **This is only when the person would otherwise be unable to participate in the community and/or activity in the absence of the exceptional approval.**

Factors that Passport Agencies should consider in deciding if such supports or expenses should be approved include whether they:

- Are reasonable and appropriate
- Align with the goals and principles of the Passport program set out in Section 1 of the Guidelines (see page 3)
- Promote social inclusion and enable community participation that would otherwise be unachievable
- Foster independence

Prior approval from the Passport Agency must be obtained to receive reimbursement for supports/expenses that are not normally covered under the program.

Indirect Respite: The Passport Agency may also approve indirect respite in extenuating circumstances. Indirect respite services and supports are **short-term** arrangements (up

to six months) that help the primary caregiver manage household and family responsibilities that are not directly related to caring for a person with a developmental disability. Indirect respite is intended to support primary caregivers in situations where extraordinary demands on their time and/or physical, mental, or emotional resources would compromise their well-being or that of the person(s) they are caring for.

The Passport Agency may extend approval for indirect respite services and supports if the caregiver is unable to make alternate arrangements or obtain the required supports in the initial six-month timeframe.

Factors that Passport Agencies should consider in deciding whether indirect respite should be approved due to extenuating circumstances include:

- Change in support needs or support arrangements (e.g., loss of service and the caregiver must take on the role or work of a support worker/service provider until the needed supports are put in place).
- Competing caregiving demands (e.g., caring for other family member(s) with special needs or aging parents).
- Health and safety of the caregiver (e.g., inability to cope and the caregiver is at risk of burnout; recovery from major illness or medical procedure).

- Health and safety of the person with a developmental disability (e.g., professional house cleaning services are needed due to a medical condition).

Prior approval from the Passport Agency is required to receive reimbursement for expenses for indirect respite support.

The approval process for all extenuating circumstances, including indirect respite supports, is as follows:

- The Passport recipient requests approval from the Passport Agency by phone, mail or email. The request sets out the situation and type of services and supports that are needed.
- The Passport Agency documents the individual's request and determines whether the circumstances are extenuating. Final approval from a Passport Agency manager is required.
- The Passport Agency may notify the Passport recipient of the decision by telephone, but must also provide a written response within 10 business days of reviewing relevant information and finalizing its decision on a request for indirect respite supports.

How Passport Funding Works

The Passport program provides funding for community participation, activities of daily living, person-directed planning and caregiver respite services and supports. This is based on the assessed support needs identified in an eligible individual's application for developmental services completed at the Developmental Services Ontario office. Funding for individuals who applied directly to a Passport Agency prior to July 1, 2011, and who have not completed an application package at the DSO, is based on information from the individual's Passport Application. Passport Agencies determine an individual's funding amount using a standard funding formula.

The maximum annual funding an individual can receive through the Passport program is \$35,000.

To promote a fair and equitable service system, all applications for Passport are prioritized according to individuals' support needs and circumstances and available resources.

Passport funding can be used to pay for any supports and expenses that are admissible under the program. Apart from administration (up to 10% of allocation) and person-directed planning (\$2,500 annually), there are no caps

on the amount for each type of support, providing it is within the total funding amount allocated to the individual.

All Passport recipients sign a funding agreement with the Passport Agency. The Passport Agency will work with individuals and families to arrange payments with their chosen service provider(s) if they would like to receive supports through a service agency.

Roles and Responsibilities

For individuals who manage their own funding and support arrangements, the quality of supports, liability, and compliance with tax, labour and other laws are their responsibility. Developing a back-up plan to deal with unexpected situations, such as when a support worker is sick, unavailable or cannot provide the supports, should also be considered.

Accountability for the funding received through Passport also rests with the individual(s) with whom the Passport Agency has entered into a funding agreement. The terms and conditions of the funding are set out in the funding agreement with the Passport Agency, which includes:

- Annual funding amounts
- Effective dates for the approved funding
- Roles and responsibilities of the respective parties

Individuals who manage their funding are responsible for meeting all the administrative rules and requirements outlined in these guidelines and those set out in the funding agreement with the Passport Agency.

Hiring a Support Worker

The selection of service providers is the decision and responsibility of the Passport recipient.

The following is meant to be informational only and is not intended as legal or financial advice. Passport recipients are responsible for understanding and meeting the legal and financial obligations associated with hiring support workers.

Be aware that when hiring a support worker, an employer's obligations and responsibilities will depend on the employment status of the support worker and whether he or she is an employee or a self-employed individual under Canada Revenue Agency rules.

Resources for hiring a support worker

- The Canada Revenue Agency provides general information and a number of guides and forms for employers on its website at: www.cra-arc.gc.ca/formspubs/clntgrp/bsnss/mplyrs-eng.html
- **Guides to the Ontario Employment Standards Act, 2000** and the **Occupational Health and Safety Act** can be found on the Ministry of Labour's website at: ontario.ca/bxhy and ontario.ca/bxks
- To support individuals and families who manage their own funding and supports, the Ministry of Community and Social Services has worked with individuals who have a developmental disability to create a booklet entitled **Hiring a Support Worker: A Guide for Ontarians with a Developmental Disability** that provides information on questions and issues to consider and some of the steps involved in hiring a support worker. The booklet is available on the Ministry's website at: ontario.ca/bxh1

Quality of Services and Supports

Individuals who manage their own funding and supports are responsible for monitoring the quality of the services being purchased. Complaints or concerns about the quality of supports must be taken up with the service provider, not the Passport Agency.

While developmental services agencies funded by the Ministry of Community and Social Services are regulated and monitored by the Ministry, other agencies and service providers are not. In some cases, mainstream community agencies or private service providers will be regulated by a different level of government, a professional association or a statutory body. Where organizations are not regulated, there may not be an overseeing body that can hear complaints and help resolve problems.

Some questions to be asked when selecting a service provider include:

- What type of supports will they provide?
- What are the costs of the supports?
- Are there any conditions related to the provision of the support?
- What will my responsibilities be?
- Does the service provider have adequate insurance coverage (e.g., in case a support worker is injured while at your home)?
- Does the service provider have references?
- Do they have a complaints process you understand and feel confident about?

Budgeting

It is recommended that individuals who manage their own funding prepare a budget that reflects how they will use their money to meet their support needs and goals. Some things to consider when developing a budget include:

- What you want to achieve with your funding (e.g., your support needs and goals).
- How you will spend your money (e.g., activities and supports to meet your needs and goals).
- When during the year you will spend your money. (e.g., you may plan to spend some of your money each month throughout the year, or you may plan to spend most of it over the summer holiday period).
- The cost of the activities and supports.

The Passport Agency can provide additional information and resources about preparing an annual budget.

Reimbursement

Passport is a reimbursement program. Individuals and families submit invoices and receipts to the Passport Agency and are reimbursed for their expenses.

The local Passport Agency will provide information about the processing of invoices and payments.

For some people, paying for supports up front may cause financial hardship. In such situations, Passport Agencies may advance funds for admissible supports and expenses. These advance funds will be reconciled against actual spending and subsequent instalments will be adjusted to avoid overpayments.

If an individual receiving funding through Passport is no longer using some or all of their funding, or is not using it appropriately, the Passport Agency will review the situation. They will discuss the reasons and explore possible solutions such as:

- Transferring funding to a transfer payment agency or having a third party administer funds on their behalf.
- Providing information and tools on the recruitment and retention of staff.
- Providing information on other supports that may be useful such as case-management.

Misuse of Funding

Passport funding is to be used solely to meet the service and support needs of adults with a developmental disability and the respite needs of their caregivers, as set out in the Passport Guidelines and Funding Agreement. The Passport Agency may suspend or terminate funding where the individual receiving or managing Passport funding does not comply with the terms and conditions of the Funding Agreement. Further information may be requested and law enforcement and/or legal action may be pursued in cases where Passport funds have not been used in accordance with the Guidelines and Funding Agreement (e.g., submission of expense claims that appear to be incomplete or false).

Questions

If you have any questions about the Passport program or these Guidelines please contact your local Passport Office. See list of Passport agencies at Ontario.ca/bxj7