Policy Number: SE4.134	**Policy Section:** Supports and Services	**Effective:** November 12, 2007 **Amended:** April 5, 2024
Title: Request for Service Policy	**Executive Sponsor:** Vice President, Service Delivery and Innovation	

Between January 2024 – March 2025, CLBC regions will be implementing a new management structure that will shift some responsibilities between regional management roles. To best manage this change, CLBC is implementing this new management structure region by region rather than all at once. CLBC's North Thompson-Cariboo region has already adopted this new structure, and this will be followed by the South Fraser and Vancouver Coastal regions in summer 2024, and by the Vancouver Island and South Interior Regions in fall 2024. During this transitional period, people receiving CLBC services in regions using the new leadership structure may see some change in assignment of management responsibility outlined in this policy.

1. PURPOSE

This policy provides direction for CLBC staff about one of the five components of resource allocation – documenting and prioritizing requests for service.

It is designed to be used together with the *Resource Allocation Policy* and the *Support and Planning Policy*. Together these policies and related tools support an integrated approach to informed, fair, and consistent decision-making about the type and amount of CLBC-funded service(s) for eligible individuals.

2. DEFINITIONS

Guide to Support Allocation (GSA): An electronic tool used by CLBC to outline an individual's disability-related needs.

I**ndividual:** A person 19 years of age or older who is eligible for CLBC services, as described in the *Eligibility Policy*.

PARIS: The CLBC electronic personal information management system.

Personal Summary: A document created by a youth or adult and their family, with support from others as needed, that helps CLBC and other planning partners get to know who the person is, what is important to and for them and, where relevant, their support requirements. It

can assist CLBC and others with planning, and with gathering information to complete assessment documents required to request support and/or funding through CLBC. The document is the individual and/or family's personal property.

**Planning Registry*:* A report that lists requests for service for individuals and youth that are not currently needed but are required in the future.

**Request for Service List*:* A report that identifies current requests for service from individuals and/or their families.

Support Network: Friends, family and/or community members who provide personal support, advocacy and/or help with monitoring services and who have reciprocal relationships with individuals.

Target Start Date: The date that the individual and/or family want the service to start.

Youth: A person who is 16 years of age or over, but under the age of 19.

3. POLICY

3.1 An individual and their family and/or support network may request CLBC-funded services verbally or in writing, or as part of an individual's plan, if available. CLBC records and documents every request for service in a consistent way. A request for service includes the type of service(s) CLBC may provide for an individual, as outlined in the *Resource Allocation Policy*.

3.2 CLBC records requests for service on the individual's record in PARIS. Requests for service form the Request for Service List and the Planning Registry. The 'target start date' is the same as the date that the service is recorded when the individual and their family request the service to start right away. See section 3.6 for recording future requests for service.

3.3 The Request for Service List report is maintained in order of priority, based on urgency of need, as determined using the *Request for Service Priority Tool.* When more than one individual has equal priority, the date of service request determines the order in which funding is approved.

3.4 Individuals with the greatest urgency and those receiving no services have a higher priority than those already receiving services and requesting new or enhanced services.

3.5 CLBC can only change request for service start dates at the request of the individual, their family and/or support network. Other changes to requests for service may be made in response to any new information about an individual's circumstances that could affect their urgency of need.

3.6 Once a request for service status changes to 'service requested,' the service's targeted start and end dates cannot be altered. See section 4.1 (g) for direction on how to enter revised requests for service.

3.7 Where an individual requires services to be put in place to respond to an emergency, CLBC's response to the individual is a priority and recording the service request may be delayed. CLBC records the request for service in PARIS as soon as it is possible following the implementation of services for emergency situations.

3.8 CLBC records requests for service that are not immediately needed, but are desired in the future, including those from transitioning youth who will be eligible for CLBC-funded services. If the 'target start date' is in the future, the request becomes part of the Planning Registry which CLBC uses for guiding future resource planning.

3.9 CLBC communicates with individuals and families about their requests for service including explaining when CLBC -funded services are likely to be provided.

4. PROCEDURES

4.1 Facilitators:

a) Complete the *Request for Service Priority Tool Screen* in PARIS after the type and amount of service(s) CLBC may provide has been determined, as outlined in the *Resource Allocation Policy*. Facilitators refer to the *Resource Allocation Practice Guide* and the *Guide to the Request for Service Priority Tool* for detailed directions.

b) Ensure the request(s) for service dates including target start and end dates are accurate. Targeted start and end dates are 'read-only' once the PARIS request for service status is changed to 'service requested'.

c) Review required information including:
- Individual's Personal Summary (optional for service requests for employment services and core and enhanced funding only),
- Conversations with the individual and their family and/or support network,
- Individual's PARIS record and other relevant documentation, and
- Information from other involved professionals, external planning partners and current service provider (if available).

d) Review additional (non-required) information if it is available and has been shared including the individual's plan and other information the individual and family chooses to share about themselves.

e) Communicate the results to the individual and their family and/or support network. Follow-up with a letter that:

- Acknowledges the nature and date of the request(s) for service,
- Confirms that their request has been recorded,
- Provides an estimated timeframe when CLBC services will likely be available,
- Encourages them to keep CLBC informed of changing events that could impact their need for CLBC-funded supports, and
- Suggests alternative options while waiting for CLBC- funded supports, if applicable.
- Advises that the individual's Personal Summary may need to be updated in the future as outlined in the *Support and Planning Policy.*

f) Update the request for service and/or *Request for Service Priority Tool* in PARIS, and communicate any change to the individual and their family or support network whenever:
- New information is provided that may affect the priority of a request for service.
- CLBC begins providing some service(s) and this affects the urgency of need for other requested service(s).
- An individual who already has a documented request for service moves into a new service area. In this case, facilitators reflect changing circumstances and opportunities in the new community, and maintain the original date of the service request.
- An individual and their family ask for a request for service to be withdrawn or changed, due to a change in circumstances.

g) Cancel the request for service and enter a new request if the individual, their family and/or support network request a different service or a new targeted start date.

h) Refer an emergency request for service to the Integrated Service Manager.

i) Where emergency funding is expected to be ongoing, encourage individuals and families to complete a Personal Summary and determine, if, how and with whom they would like to plan within four months of initiation of emergency funding.

j) When the funding or service requested is available, contact the individual and family to confirm that they will accept the offer.

4.2 Analysts:
a) As funding becomes available, review the Request for Service List and Planning Registry in collaboration with the facilitator to contribute to budget management decisions and planning processes consistent with regional workflows.

b) Cancel a request for service if the request is withdrawn by the individual or family.

4.3 Integrated Service Managers:
a) Ensure facilitators are trained in applying this policy and supporting them to communicate effectively with individuals and families or support networks.

b)   Facilitate solutions to issues or concerns raised by individuals and families or support networks.

c)   Use the Request for Service List and the Planning Registry to support proactive budget and resource development planning.

d)   Confirm requirement for emergency funding.

e)   Approve up to six months of funding for service on an emergency basis for an individual who is in an extenuating, urgent or critical situation requiring immediate service provision.

f)   Begin the procurement of new services following the completion of a Personal Summary, when an emergency service is requested to be ongoing. If the Personal Summary is not completed within four months of the initiation of services, request the Regional Director, approve up to a maximum three-month extension of emergency services.

5. DOCUMENTATION

5.1 Facilitators and analysts are responsible for documenting their decisions in PARIS, using a *Request for Service Note* and the *Request for Service Priority Tool Screen*.

6. PRACTICE

6.1 Consistent, professional practice is important in managing requests for service. Fair decision-making requires the administration of technical tools, the application of professional judgement, and clear communication. Facilitators are expected to be familiar and comply with the procedural and practice guidance in the *Resource Allocation Practice Guide*, and to guidance from an Integrated Service Manager or a Practice and Service Advisor, as required.

7. REFERENCES

Guidance for Staff
Guide to the Request for Service Priority Tool
Planning with People: Practice Guidance for CLBC Staff
Request for Service Priority Tool
Resource Allocation Practice Guide
Resource Allocation Policy
Support and Planning Policy

Resources for Individuals and Families
Information for Families: Getting CLBC Funded Services
Information for Families: Planning
Personal Summary