Community Living BC
Periodic Report for L.I.F.E. Service
Practice Guidance

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Introduction

Service providers submit Periodic Reports for L.I.F.E. Service (PRL) to CLBC, quarterly. These reports provide both qualitative and quantitative data which reflect the positive impacts the L.I.F.E. Service is making in the lives of individuals and their support networks. The PRL captures information which includes service delivery hours, progress towards Intended Differences, Check-in / Tune-Ups, employment outcomes, comments, and the feedback of service participants and, when appropriate, their network of support. Analyzing and understanding the PRL data can inform strategic planning, prepare CLBC Analysts for annual monitoring / site visits, identify capacity, assist service providers during accreditation, and contribute to the continuous quality improvement of the L.I.F.E. Service.

Getting Ready

There are a few administrative tasks to be done before service providers submit their first PRL. These tasks may take some time. It is important to schedule this work and coordinate with other departments, so the PRL can be submitted on time.

Create a Dedicated L.I.F.E. Service Email

Organizations are required to create a dedicated email address for their L.I.F.E. Service. Having one (dedicated) email account for the L.I.F.E. Service should mitigate any challenges (missed information, timely report submission) that could occur due to staff related issues (turnover, staff reassignment, etc.). Organizations that deliver L.I.F.E. Services in more than one CLBC region may want to develop a dedicated L.I.F.E. email address for each region's L.I.F.E. Service (please find more information below).

* It is important to set up a dedicated email address prior to the start of service delivery so the service provider and the CLBC can establish a L.I.F.E. Service communication plan, for report submissions and ongoing correspondence.

The required format for a dedicated L.I.F.E. email is:
LegalNameofOrganization_PRLReport@agencyaddress. Please do not use acronyms.
(for example, InclusionCommunity_PRLReport@InclusionCommunity.org)

For services provided in different regions the format is:
RegionLegalNameofOrganization_PREReport@agencyaddress
(for example, VCWInclusionCommunity_PREReport@InclusionCommunity.org)

CLBC Regions include:
- N: North
- TC: Thompson Cariboo
- SCO: South Central Okanagan
- NOS: North Okanagan Shuswap
- K: Kootenays
- UF: Upper Fraser
- SF: South Fraser
- VCE: Vancouver Coastal East
- VCW: Vancouver Coastal West
- SI: South Island
- CUI: Central and Upper Island

Once you have your dedicated email(s) set up, please send an email, from each new email address, to CLBC at LIFEReportHelp@gov.bc.ca. CLBC will add your organization's dedicated L.I.F.E. email address(es) to our internal tracking system. CLBC will then send out instructions to L.I.F.E. service providers regarding the password protection of documents, sending the password in separate email, where to email your PRL report (updates, changes to practice, resources and opportunities). Information is also available on the L.I.F.E. Service Toolkit.

Privacy Considerations

As per privacy legislation, service providers must ensure individuals are aware that their personal information is being collected, how it will be used, and how it will be kept safe. Please ensure there is written consent for everyone found on the PRL.

CLBC will be using the password-protect feature to ensure individuals' information is safeguarded, and secure, when service providers email their PRL reports.

* Under no circumstances should PRL reports ever be sent by email without password protecting the PRL first as it can put individuals' personal information at risk. "For Submission Only" reports are required to be submitted to CLBC using email.

CLBC Liaison Analysts will be able to access PRL reports internally, once the reports have been processed by the CLBC Employment Team.

All CLBC service providers must submit a PRL, quarterly, for each L.I.F.E. contract they hold, for the entire period the contract is in pay. In some cases, there may be multiple contracts attached to service delivery. For example, DD and PSI services may be integrated, but you must submit a PRL for each contract separately. Reports are required even if the service is not supporting individuals due to delays in referrals, and/or if the contract begins or ends within the quarter of the reporting cycle. All data entered in the report is important as it helps individuals, support networks, service providers, and CLBC better understand what is working and where service can be strengthened.

Here are a few tips to set your organization up to be successful in submitting the PRL on time:

1. Ensure all L.I.F.E. Service staff are familiar with the L.I.F.E. Service Best Practice Guide, particularly Practice 5.1 / Reporting (PRL) Requirements.

2. Decide as an organization where the PRL will be saved internally. Each quarter, users will retrieve the last quarter's PRL working copy as the starting point. Users will re-save it as per the Suggested Report Name in the header, update it, and generate For Submission Only copy to send to CLBC (macros will be removed). Using the previous working copy report as the starting point each quarter will save an enormous amount of work.

3. Each quarter users will submit the password protected "For Submission Only" PRL by email to: LIFEReportHelp@gov.bc.ca .

4. Monitor the dedicated L.I.F.E. email regularly. CLBC will use this email exclusively to send important information, and updates. There may also be situations when service providers will need to make corrections to the PRL before it can be processed / consolidated.

5. Put the PRL due dates into your corporate calendar and protect time to work on the PRL.

This will help users to prepare each quarter for an on time and accurate report submission.

6. Some service providers update their PRL report throughout a quarter. This practice may make it easier to keep up with changes and help users be ready to submit the PRL report on time.

7. <u>Do not</u> cut and paste information into the PRL template. The PRL is a very complex document. Cut and pasting information interrupts / corrupts the macros and functioning of the report and slows down the process. The report macros will likely be damaged, and data will not calculate or reflect accurately, resulting in slower processing or having to start over on a new PRL template. If you see #REF! in any field, it is usually due to cut/paste error.

8. Individuals accessing the service should be advised prior to referral, and again at intake, that their personal information will be collected and reported to CLBC. Reporting expectations should be clear and agreed / consented to.

How to Enable Macros

When you first open your PRL template, you must click on Enable Content to ensure Macros are working.

There is a common Excel security setting that can also prevent the macro from running—but the fix is simple.

✓ Save the document to a folder on your computer.

✓ Add that folder as a **Trusted Location** in Excel by following these steps:

a) Open **Excel**
b) Click **File**
c) Select **Options**
d) Go to **Trust Center**
e) Click **Trust Center Settings**
f) Select **Trusted Locations**
g) Click **Add new location**
h) **Browse** to the folder where you saved the document
i) Click **OK**

✓ Please refer to the image on the following page for visual guidance.
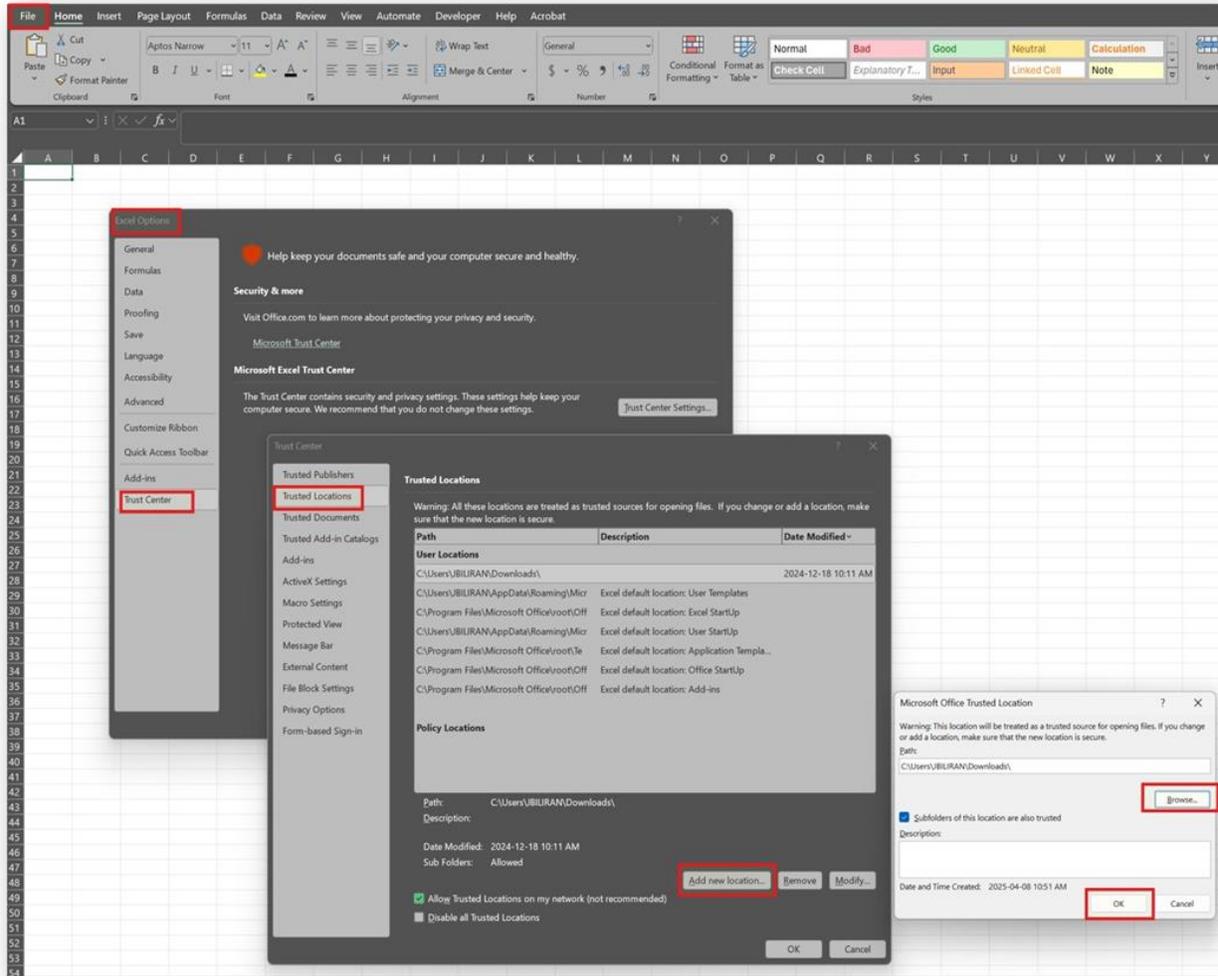
PRL Due Dates

Service providers must submit their PRL once per quarter as per the terms and conditions of their L.I.F.E. Service contract. Please note that failure to submit reports on time will initiate the Escalation Pathway (Appendix 1) to determine what support is necessary to meet report submission requirements. Regular / repeated report submission shortfalls may result in further Escalation Pathway action, which could include contract termination.

Quarter	Reporting Period	Report Due Date
Quarter 1 (Q1)	April 1 - June 30	July 15
Quarter 2 (Q2)	July 1 - September 30	October 15
Quarter 3 (Q3)	October 1 - December 31	January 15
Quarter 4 (Q4)	January 1 - March 31	April 15

L.I.F.E. Services Periodic Report Template

Service providers will collect information about the individuals receiving L.I.F.E. Services, using their own internal process and procedure mechanisms. This information will be stored as per the CLBC Privacy and Information Management course, for service providers, found here.

- ✓ Service delivery information is used to populate the L.I.F.E. Service Periodic Report (PRL) template.
- ✓ New services can send a request for a blank PRL template to LIFEReportHelp@gov.bc.ca prior to the start of the service.
- ✓ Users will use the saved PRL from the previous quarter as the starting point for each subsequent reporting cycle. Given the PRL captures longitudinal data, starting fresh on a new template is only recommended when the template macros are not functioning correctly or the PRL has become corrupted and is not salvageable.

Naming Your PRL

When naming (saving) a PRL for a new quarter, service providers will open the PRL working copy from the previous quarter. Using the 'save as' function, providers will save a new working copy of the report for the current quarter and rename the PRL accordingly before entering data.

At the end of each reporting cycle, the service provider will have two copies of the PRL.

a) Working copy
b) "For Submission Only" copy
- ✓ The "For Submission Only" copy can be saved by the service provider, for their records, or deleted (after submission) as the macros have been removed. It is recommended to delete the For Submission Only copy, once it has been submitted to CLBC and the confirmation of processing email has been received.

Service Providers open the PRL working copy from the previous quarter. Using the 'Save As' function, save a working copy of the report, and rename adding the new quarter before you start entering data for the new quarter. That way you will maintain the integrity of historical reports for reflection, data analysis and accurate record keeping.

*You can add password protection to your PRL at this stage of naming your report: see page 27.

The PRL must be submitted using the following naming convention. This is also reflected in the PRL header as Suggested Report Name:

Service area - vendor name - contract number - eligibility stream - reporting period end date.

For example:
- ✓ Kootenay LIFE Services 3152224 DD 31Dec2025 - (open this one to add new info for the new quarter).
- ✓ Kootenay LIFE Services 3152224 DD 31Dec2025 For Submission Only (this version is disposable after it has been submitted to CLBC)

Glossary & Guidance Tab

This tab contains links to the following documents, which are found on the CLBC website:

✓ Glossary of Terms: A tool to help readers better understand L.I.F.E. Service terminology, which will help with the accuracy of PRL data entry.

✓ The Periodic Report for L.I.F.E. Service Practice Guidance.

✓ For additional support and information pertaining to L.I.F.E. Services, please refer to the L.I.F.E. Service Toolkit .

Check PRL for V7:

Before you enter any information into the PRL please make sure you are using the correct (most up to date) version of the Periodic Report for L.I.F.E. template which is indicated by a V7 on the top left of the Report Tab.
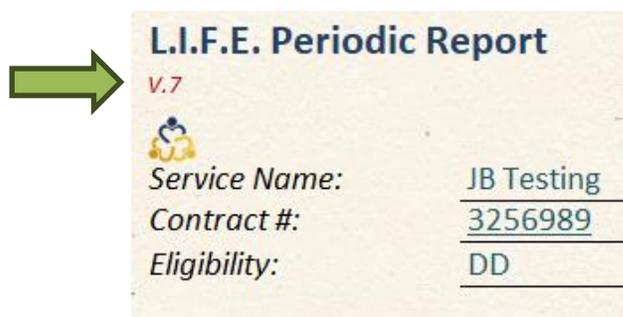
Completing Your Report
Step 1: Report Header

The first step when completing the PRL is to populate / update the header of the report. The header is located at the top of the Report Tab. It is critical that this section be updated every reporting period, and be completed in entirety, to ensure CLBC can track your organization's PRL's accurately.

✓ Some of the information, contained in the header section, will typically not require quarterly updates, including:
   a) Contract #
   b) Service Name
   c) Eligibility
   d) Vendor Name
   e) Service Area

✓ The following (header) information will change over time. Please ensure it is accurate for each reporting cycle.
   a) Reporting Period
   b) Prepared By
   c) Email
   d) Phone
   e) Date Completed

✓ The follow (header) information will auto populate.
    a) Total in Service
    b) Job Maintenance
    c) #FTE / Potential Service Hrs.

Service Name
The name of the L.I.F.E. Service, as chosen by the service provider (formerly known as Program Name).

Contract
Contract numbers are typically 7 digits long and typically start with 314 or 315. Service providers must submit one PRL per contract. If a service provider has multiple L.I.F.E. Service contracts, do not combine people, from separate contracts, into one PRL (even though services between (DD/PSI) contracts may be integrated).

Eligibility
Please choose from the drop-down choices to reflect whether the contract is for Developmental Disability (DD) or Personal Support Initiative (PSI) services, with CLBC.

Reporting Period
This field indicates the last day of the current reporting period (for example 31-Mar-2025). Please choose the correct date from the drop-down feature, in the header of the PRL.

The Reporting Period date must be updated, for each reporting period, for CLBC to accurately consolidate provincial L.I.F.E. Service data for reporting to community partners. The Reporting Period date is very important because this date sets the parameters for the calculations of all data/metrics found in the Individual Tab(s), and Report Tab. If the Reporting Period date is not correct, the consolidated data will not be accurate.

Total in Service
Indicates the number of individuals whose status is active. This field auto- populates the Report Header from the Individuals Served column, found on the Individual Tab of the PRL.

*Active individuals have a start date and no end date.

Job Maintenance
This field auto-populates from the Employment Section of the Individual Tab. Job Maintenance shows the number of individuals receiving maintenance services for a specific job from the employment page.

Vendor Name
The full legal business name of your organization, not an acronym or the L.I.F.E. Service name, that CLBC has in the Service Provider Registry (this name is used for service delivery contracts).

Prepared by

The name of the person entering data into the PRL template. If there is more than one person entering data, please identify one person to be the contact point. The person who submits the PRL may be different than the person who prepares it. It is helpful to include the person who prepares the PRL, should CLBC want to follow up.

Email

This is the email address of the person who prepared the PRL and provides an alternate contact method in case there are questions or changes due to staff re-assignment and/or turnover. This email address is not the dedicated L.I.F.E. Service email.

Service Area

Choose from the Service Area drop-down menu. If your organization delivers L.I.F.E. Services in multiple Service Areas, please ensure you submit separate PRLs for each contract and identify the correct Service Area on all PRL's.

Phone

The best number to reach the main contact person for the PRL. This could also be the general contact number for your organization. The template will auto format the phone number.

Date Completed

This is the date the report was completed and submitted to CLBC by the service provider. This date may be the same or different than the Reporting Period date.

#FTE (Full Time Equivalent) **/ Potential Service Hours**

The FTE is a unit of measure for the number of direct staffing hours for a full-time position (35, 37.5 or 40 hours per week) assigned to the contract (for example: 1 FTE = 35 hours or .5 FTE = 17.5 hours, etc.). This number does not include supervision / coordination. Users enter the number of FTEs into the Q1, Q2, Q3, and Q4 field each quarter. The number FTEs is found on the staffing schedule page of the organization's L.I.F.E. Service Program Budget negotiation tool. Potential Service Hours are based on the estimate that 1 FTE will provide 420 service hours in the quarter (12 weeks/3 months). Remember: Potential service hours are only an estimate meant to support the understanding of service capacity and may not align with the required service level hours of contract.

Please note: Service level reporting is an entirely different process that takes precedence over the PRL service level hours field; the rules of service level hour requirements apply. Additional guidance can be found below:

Terms and Conditions General
Service Level Reporting Guidance for Service Providers

Suggested File Name

This field auto populates using information from the other fields of the header. The suggested file name will also include the reporting period date, which is another check point to ensure the Reporting Period date is accurate.

	Q1	Q2	Q3	Q4	
# FTE / Potential Service Hrs.					
Suggested File Name:			Kootenay - Jolibee Testing 3256989 DD and PSI - Mar2026		

Reminder:
When you have completed the header section of the Report Tab, it is critical to ensure:
- The Reporting Period date is correct.
- The naming convention of the report reflects service area, vendor name, contract number, eligibility stream, and reporting date
- The FTE and number of individuals served aligns with best practice. Is there capacity for new referrals?

Step 2: Individual Tab

Information is entered into the PRL, on the Individual Tab, and should create an accurate (quarterly) picture of a person's L.I.F.E. Service journey. Information is gathered throughout a person's service experience.

Fiscal Years

The PRL has been designed to reflect two fiscal years of data. The fiscal year spans from April 1 to March 31.

For example, if the template contains data from June 2025 to March 2027, the template will need to be re-set for the next two fiscal years for the June 2027 report. To re-set your template go to the Individual Tab, on row 408, below all the individual's names, you will see a box that says Renew Template. Click the button and the template will automatically reset for the next two years. You will be given two prompt messages to confirm that you would like to reset the template.
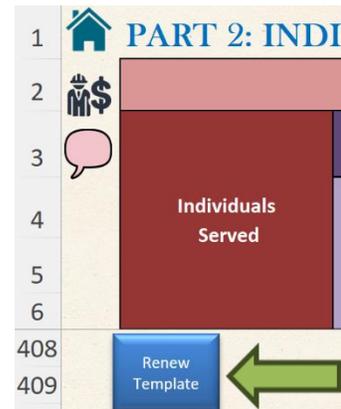
* Please note L.I.F.E. Service measurements and data fields will be deleted / cleared.
* Historical data will be saved in previous versions of the report.

General Information:

Information for each person receiving the service will be reflected in one row. Scroll forward (right) in the template for each quarter using the scroll bar (on the bottom right of the Excel screen). The individual's name will remain frozen on the left side of the template, so the service provider can have confidence that they are entering information for the correct person.

Individuals Served:

Enter the full legal name, not a nickname or shortened version of the person's name. (e.g. Sandra Brown, not Sandi Brown).

- Note that each person served should have their own (1) row.

- If an individual exits service and then comes back, delete the date found in the End of L.I.F.E. Service section / cell. Enter a new Start of L.I.F.E. Service date and commence with populating the correct quarter with data.

- Do not delete the previous employment record(s) for this person.

Individual Profile

Status:

The PRL template will identify those individuals who are active in the service based on entering the Start of L.I.F.E. Service date. When an End of L.I.F.E. Service date is entered, the status will automatically change to closed and the individual's line of information will move below the active individuals.

GENERAL INFORMATION											
Individuals Served	Individual Profile										
	Status	DD/PSI	PRISM #	Gender	Date of Birth	Employed at Intake	Indigenous Identity	Start of L.I.F.E. Service	End of L.I.F.E. Service	Reason for Ending Service	No. of Months in Service
Alana White	Active		235	Female	18-Jan-95	No	Yes	01-May-25			11
Jon Martinez	Active	PSI	100234	Male	12-Jun-95	Yes	No	01-Jan-25			15
Lucas Gray	Active	PSI	100241	Male	18-Jan-95	Yes	No	01-Jan-25			15
Maria Singh	Active	DD	100238	Female	18-Jan-95	No	No	20-Apr-23			35
River Dela Cruz	Active	PSI	100243	Other	11-May-90	No	No	10-Oct-22			42
Skyler Jones	Active	DD	100236	Other	21-Jan-00	No	No	10-Jan-23			39
David Chen	Closed	DD	100237	Male	19-Aug-92	Yes	Yes	01-Jan-25	05-Feb-25		1
Ethan Black	Closed		239	Male	12-Oct-85	Yes	No	15-Jan-22	01-Jan-25		36
Jasmine Moore	Closed	DD	100240	Female	25-Jul-94	No	Yes	01-Dec-21	01-Dec-22		12

DD/PSI Eligibility

Please choose from the drop-down choices to identify whether the individual is eligible for Developmental Disability (DD) or Personal Support Initiative (PSI) services, with CLBC.

PRISM Number

When individuals meet eligibility requirements for CLBC, their information is entered into CLBC's information management system called PRISM; Individuals are then assigned a PRISM number. PRISM numbers are provided by a CLBC Liaison Analyst when the person is referred to L.I.F.E. Services. A person's PRISM Number will never change.

Gender

Service providers choose from the drop-down menu options of male, female, unspecified, and prefer not to report. "Prefer not to report" is to capture any people who did not feel comfortable reporting their gender.

DOB

The individual's date of birth or birthday. The date of birth consists of the day, month and year (in this order) and should be formatted: DDMMMYYYY (such as 02Feb1990).

Employed at Intake

This field captures the person's employment status when starting their L.I.F.E. Service. If the person has a job when entering service:

- ✓ Enter the employment details in the Employment Data and Measurements Section of the PRL under 1st Job.
- ✓ Identify services (Job Coaching / Maintenance) as necessary.
- ✓ Capture any new jobs under 2nd, 3rd Job, etc.

Indigenous Identity

Service providers choose from the drop-down menu to indicate whether the person self-identifies as Indigenous. The options are yes, no, unknown, or prefer not to report.

Start of L.I.F.E. Service

Enter the date of intake / orientation with the individual. Please enter the DDMMMYYYY format (such as 10Feb2025).

End of L.I.F.E. Service

Ending L.I.F.E. Services may require CLBC Facilitator involvement for planning purposes. Ending service can occur when a person:

- ✓ No longer wants to receive the service.
- ✓ Does not engage in services. Please refer to the L.I.F.E. Service Best Practive Guide for more information. (Practice 4.7)
- ✓ Moves out of province.
- ✓ Deceased.

When you intend to enter an End Date of L.I.F.E. Service, it is imperative to review the person's information to ensure all service measurements and employment details are accurate at the time of ending service. Remember to enter an end date for all active services. When ending service, please also indicate the Reason for Ending Service by choosing from the options in the drop-down menu.

If the individual is deceased, or not likely to return to service, it is recommended to remove the individual's information from the report in the following reporting quarter, by clicking on each field and then click delete. Historical information will be stored in previous versions of the report. You can add new referrals to vacant rows.

Reason for Ending Service

Choose the best option from the drop-down menu that describes reason for ending service. The choices are:

- ✓ Individual indicates service no longer required
- ✓ Individual withdrawn from labour force
- ✓ Moved out of region or province
- ✓ Illness or injury (Please remember to submit an Occurrence Based Report to indicate disruption in service if the person intends to return).
- ✓ Deceased
- ✓ Service Not a Fit

✓ Retired

Remember: Individuals do not exit service unless they ask to, or the above apply. L.I.F.E. Services are ongoing, even after they achieve stable, meaningful employment, healthy relationships, inclusive opportunities, and require minimal check ins.

No. of Months in Service
This field will automatically calculate the total number of months the individual has been in (received) service, using the Start of L.I.F.E. Service date and the Reporting Period End date.

Entering the Data
Information entered in the Individuals Tab auto-populates the Report Tab to create a service level view. There are three places on the Individual tab to add content:
- ✓ Services Measurements and Data
- ✓ Employment Data & Measurements
- ✓ Comments

At the top left of the Individual Tab, you will see three icons:
- ✓ **House**: If you click on the house, the template will automatically take you to the page where you enter L.I.F.E. Service Measurements and Data.
- ✓ **A person wearing a hard hat with a dollar sign**: If users click on the person wearing a hard hat/dollar sign, the template will take you to the page where you enter Employment Data & Measurements.
- ✓ **Speech bubble**: By clicking on the speech bubble icon, the user is prompted to:
    1. Click bubble
    2. Click a name
    3. Click OK (or cancel if done in error)
    4. Confirm selection. Click yes (or no/cancel if done in error)
    5. Writer will be moved to comment section. Please note comments are not case notes or long narratives. Comments are meant to provide qualitative context to support data. Any comments regarding attendance concerns should be sent via Occurrence Based Report Forms to your Liaison Analyst.
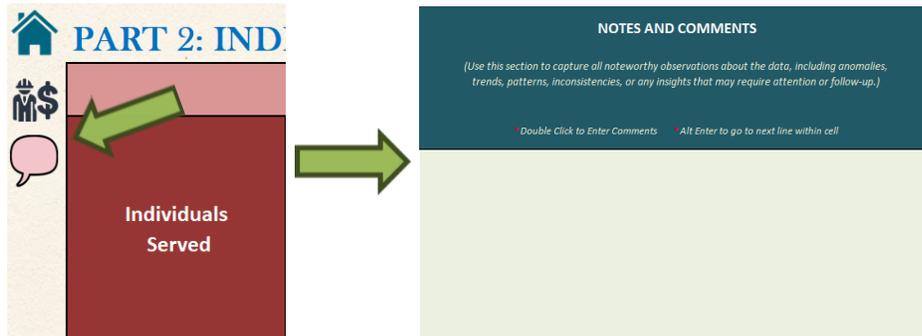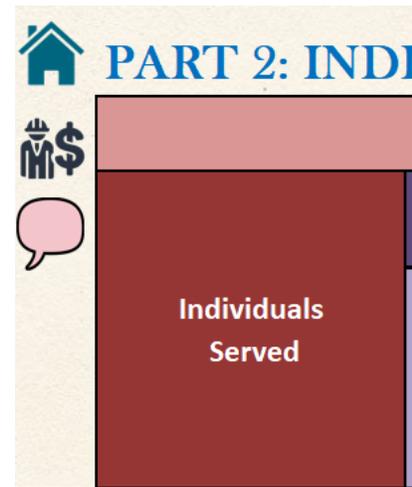
Transfer Button

Each quarter (identified by month/year) has a transfer button. When you click on it, the Progress Toward Intended Differences Individuals are Seeing in their Lives data from the current quarter, will auto populate the next quarter. For example, December 2025 data will be replicated in the March 2026 fields.

Transfer ←											
PROGRESS TOWARD INTENDED DIFFERENCES INDIVIDUALS ARE SEEKING IN THEIR LIVES											
Intended Differences Stated				In Progress				Intended Differences Achieved			
L	I	F	E	L	I	F	E	L	I	F	E
2	1		4				3	2	1		1

Users will still have to manually input the following:
- ✓ Direct Hours (A/B)
- ✓ Ind. Report (Individual Report)
- ✓ Check In
- ✓ Tune Up
- ✓ Reported change in Confidence
- ✓ Reported Change in Supports

Progress Toward Intended Differences Individuals Are Seeing in Their Lives
Cornerstones

There are four fields in each section below representing the four cornerstones of the L.I.F.E. Service:
- ✓ Learning (L)
- ✓ Inclusion (I)
- ✓ Friendship (F)
- ✓ Employment (E)

For each of the cornerstones, service providers will enter a number or leave the cell blank if the individual is not focusing on that area of their service.

Intended Differences Stated

Service Providers will enter the number of Intended Differences the person has identified for each cornerstone. Please note, employment must always be included in planning with individuals; employment is the primary cornerstone in a L.I.F.E. Service. If the individual does not want to pursue employment (now or in the future), then a CLBC Facilitator should be involved in exploring additional planning, as the L.I.F.E. Service may not be the right fit, right now.

In Progress

Service Providers will enter the number of Intended Differences that the person continues to work on for the quarter for each cornerstone.

Intended Differences Achieved

Building on the Intended Differences Stated and In Progress sections, the Intended Differences Achieved section captures the Intended Differences that have been achieved in the quarter. Service providers will enter the number of achievements for the quarter for each cornerstone.

Note: The consolidated Intended Differences section of the Report Tab reflects the difference the service is making in the lives of all individuals and their support networks, during the current quarter and longitudinally over two years.

PROGRESS TOWARD INTENDED DIFFERENCES (THIS QUARTER)

No. of Intended Differences Stated: _____
No. of Achieved: _____
No. of In Progress: _____

Cornerstone	Stated	Achieved	In Progress
Learning			
Inclusion/Connections			
Friendships/Relationships			
Employment			
Totals			

PROGRESS TOWARD INTENDED DIFFERENCES

Status	FY 2025-26				FY 2026-27			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Stated								
Achieved								
In Progress								
Totals								

✓ What areas are people seeking positive changes in their lives (Intended Differences)?
✓ Is there movement or progress towards achieving change?
✓ Does there appear to be a correlation between the achievement of the differences people were looking for in their lives, and employment?
✓ Are there any apparent patterns or trends regarding intended differences, quarter to quarter or year to year?
✓ Is there anything that surprises you?
✓ Are there external, internal, personal, or other factors that impact progress?

Direct A and Direct B (Service Delivery Hours)

The L.I.F.E. Service framework does not assign hours (per person per week) in the same way as other CLBC contracts. The ebb and flow of service delivery is foundational and key to the success of L.I.F.E. Service. Service providers enter the total number of hours per quarter, of both Direct A service (service with the individual; face to face, phone calls, texting, virtual meetings) and Direct B service (service provided to advance intended differences on behalf of the individual).

Direct B services may include things like conducting research, building employer relationships, community mapping, and planning / networking with community partners or natural supports. Tracking Direct A and Direct B are not the same as tracking Service Level Hours. Please refer to contract Terms and Conditions for additional information.

✓ Individuals typically benefit from more Direct A service when entering the service or when new intended differences are articulated.

✓ Less Direct A service will likely be required when a person's independence and/or natural support increases.

✓ L.I.F.E. Services focus on multiple areas and will ebb and flow between cornerstones and Intended Differences.

✓ Patterns of Direct A to Direct B service delivery could create an opportunity for the service provider, the individual, support network, and CLBC to discuss what these patterns could mean. For example, as service providers gain more experience in research and planning does it influence how much face-to-face time (Direct A service) they provide?

TOTAL HOURS DELIVERED THIS PERIOD:

Direct A Hours: 20
Direct B Hours: 15

Note: The consolidated Total Hours Delivered this Period section on the Report Tab reflects the total number of Direct A and B service delivery hours for the quarter. It is important to note that Direct A and B services should ebb and flow (change) over time, for each person and for the overall service.

DIRECT A AND B SUPPORT FLUCTUATIONS
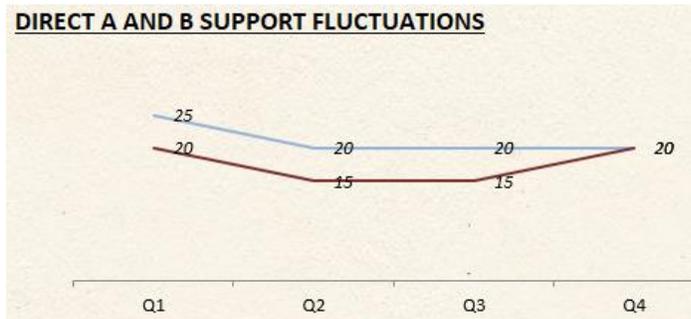
Note: Longitudinal data is also consolidated on the Report Tab, which reflects the total number of Direct A and B service delivery hours over 2 fiscal years. This service delivery data should change over time, as people become increasingly independent and new people enter services.

Individual Report

At any time, a service provider can generate an Individual PRL report to share with individuals and their support networks to encourage transparency, learning, collaboration, and celebration. Service providers will select yes or no from the drop-down menu to indicate whether the individual received an Individual Report during the quarter. These Individual Reports are shared with people and their support networks (with consent) during check-ins, tune ups, difference reflections, and should happen once per year minimum.

How to Generate Individual Reports
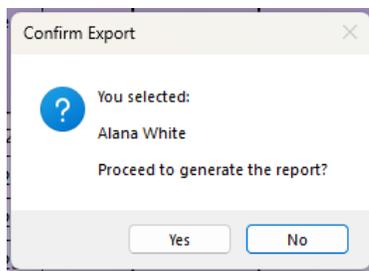Above the General Information section of the Individual tab, you will see an icon of a person
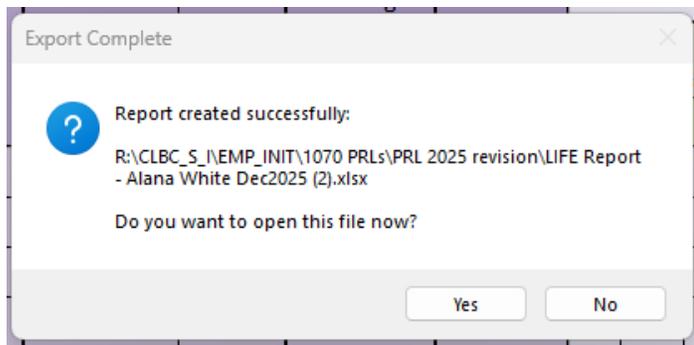
wearing a bowtie beside a red box.
- ✓ Click on the red box beside this icon; a drop-down feature will appear.
- ✓ You will see the list of all people that are active in the Individuals Served column.
- ✓ Choose the person you would like to create an Individual Report for.
- ✓ Their name will appear in the box; click on the person icon.

- ✓ Confirm Export or cancel

- ✓ Open report or cancel.

- ✓ The template will generate a report that contains information for only the selected person. It can be saved in the same place that the working PRL copy is saved.
- ✓ An Individual Report looks the same as the Report Tab on the PRL. It consolidates the

information and provides a snapshot of service.

Check-Ins and Tune-Ups

Check-Ins are intentional and strategic conversations with individuals about how their L.I.F.E. Service experience is going. Service providers enter the number of check-ins that occurred during the quarter. Check-Ins are key indicators of service evaluation.

If it is determined that changes to service delivery are needed, a tune-up should occur. Tune-Ups are an indicator of responsiveness and person-directed services. Service providers enter the number of Tune-Ups conducted during the quarter, which will reflect the number of changes that occurred in response to their service experience and feedback.
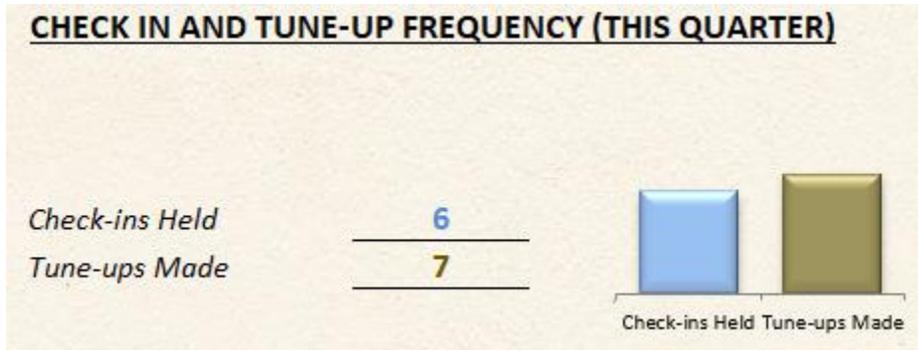
Note: Check-In and Tune-Up frequency is consolidated in the Check-In and Tune-Up Frequency (This Quarter) section of the PRL Report Tab.

- ✓ This section of the PRL seeks to understand service provider responsiveness to an individual's service experience and the degree to which the feedback from service users and their support networks is directing the service experience.
- ✓ It is reasonable to expect that Tune-Ups are happening on a regular basis, with all individuals in the service.

Reported Change in Confidence and Reported Change in Supports

Information about confidence and changes in natural/community support is captured in these sections. This information is gathered from two perspectives:
- ✓ The individual
- ✓ The individuals support network

- Information in the Reported Change in Confidence section is indicated by "G" (I am good) or "W" (Working on it).
- Information in the Reported Change in Supports section is indicated by "Y" (Yes) or "N" (No).

Reported Change in **Confidence**								Reported Change in **Natural Supports**							
Individual				Support Network				Individual				Support Network			
L	I	F	E	L	I	F	E	L	I	F	E	L	I	F	E
G	W	W	G	G	W	G	W	Y	N	Y	N	N	N	N	Y

Note: Consolidated Changes in Confidence and Natural Support (this quarter and longitudinal) can be found on the Report Tab of the PRL.

- ✓ It is important to note that confidence and natural support levels may not grow indefinitely.

- ✓ When progress towards increased independence and/or natural support is stalled for an extended period, the service could benefit from additional service evaluation (Check-In / Tune-Up) and planning with the individual and (when appropriate) their support network.

- ✓ Do challenges, complexities or unique circumstances exist within the service or community that need to be better understood?
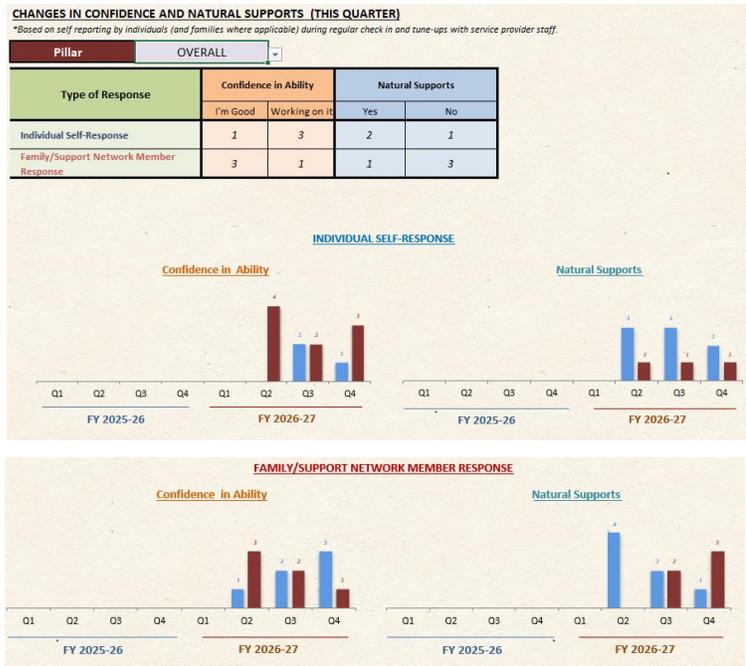
CLBC's Definition of Employment:

Paid work that takes place in an integrated community setting, alongside people without disabilities; and where wages, benefits, and working conditions comply with industry standards and relevant laws (BC's Employment Standards Act). Employment does not include work experience or volunteering but may include self-employment. Employment is sometimes referred to as "real work for real pay".

Employment Data & Measurements

To enter employment details, click on the person wearing the hard hat / dollar sign. Vocational

Counsellors / L.I.F.E. Service staff must ensure all paid employment opportunities meet the expectations outlined in the Employment Service Best Practice Guide before entering job details. The PRL template allows service providers to enter all employment information for each person.

Start Date	End Date	Job Title	Weekly # Hours Employed	Hourly Wage	Type of Employment	Job Aligns with Career Goal	Industry	Job Coaching		Job Maintenance		Enhanced Employment (this Quarter)
								Start	End	Start	End	
02-Apr-25		Admin assistant	15.00	23.00	Regular	Completely	Finance and insurance	03-Apr-25	01-May-25	02-May-25		e) Same job, higher pay
15-Jul-25	30-Jul-25	Cashier	5.00	19.00	Regular	No	Retail trade	15-Jul-25	30-Jul-25			
16-Sep-23		flag person	35.00	27.00	Seasonal	Completely	Construction			02-Jan-25		
20-Nov-25		Musician	4.00	25.00	Self-employment	Completely	Arts, entertainment and recreation	21-Nov-25				
02-Mar-24		Web designer		19.00	Contract	Somewhat	Professional, scientific and technical services	01-Nov-25	09-Nov-25	10-Nov-25		No set hours.

EMPLOYMENT DATA & MEASUREMENTS — 1st Job

Start Date
This is the first day on the job when the individual is getting paid. Enter the date in DDMMMYYYY format (02Nov2025).

End Date
This is the last day of paid work for the Individual, and this date would also be reflected on Record of Employment or ROE. Enter the date in DDMMMYYYY format (02Nov2025). Once an end date is input, the row will turn red, this indicates this job is no longer current.

Job Title
This is the Individual's position or primary role, with their employer.

Weekly # Hours Employed
Enter the total hours per week the individual usually works. Please always ensure the PRL meets labour standards.

Hourly Wage
Enter the person's current hourly wage. Please ensure that labour standards are met (at least minimum wage) and the PRL always meets labour standards. If a person's hourly wage changes because of a pay raise or increase to minimum wage, be sure to update this information on the PRL. If the person does not want to tell you what they are paid, then input the current minimum wage in BC into the PRL.

If the Individual is self-employed or paid by contract, you would enter an average hourly wage (note: this may be less minimum wage). If it is not a minimum wage, and you feel it would be important to make note of the rationale, please add this information to the comments section of the PRL.

Type of Employment
This field has a drop-down menu to choose regular, seasonal, self-employment, contract or other (specify). Please note employment does not include volunteering or work experience.

Job Aligns with Career Goal
Individuals and service providers need to consider whether the individual's current job is a

steppingstone that aligns with the Individual's career aspirations. Choose from the drop-down menu: No, Somewhat, or Completely. If the choice is no, the individual should be encouraged and assisted to create a path towards a meaningful job that aligns with their long-term goals.

Industry

Choose the best industry fit, from the drop-down menu, that aligns with the individuals job title.

Job Coaching (also known as on the job support)

Job coaching services typically happen at the beginning of a new job when the individual is learning to complete the tasks assigned by their employer, and when the individual, employer and service provider are figuring out the working relationship. Job coaching can also happen when new duties are assigned, the employees' position changes, the employees' job is at risk, or there is turnover for the employer (for example, a new manager is hired). These services are to assist the individual to learn (re-learn) to complete their job duties, create independence, and identify natural support in the workplace.

Job coaching services typically transition to job maintenance services when the employee can complete their work-related responsibilities, becomes confident / independent in the workplace, when natural support has been identified, and strategies for long-term success, are in place.

- ✓ Enter a start date when job coaching starts, which is typically the first day of employment. If re-training or additional coaching is required, delete the previous coaching start/end dates and enter a new coaching start date.

- ✓ Job Coaching and Job Maintenance services cannot be open at the same time.

Job Maintenance

When employment is stable, the individual is working independently, natural support is in place, and/or the employer is well positioned for long-term success, job maintenance service can usually commence.

- ✓ The service provider checks in with the individual or employer, only as needed.
- ✓ The individual (employee), employer, or natural support require minimal or no services, except for checking in to see if things have changed.
- ✓ The goal of maintenance is to sustain employment, identify job enhancement opportunities, ensure labour standards are being upheld, and/or to mitigate job in jeopardy situations.
- ✓ Maintenance ensures the individual remains connected to L.I.F.E. Services, should circumstances change.
- ✓ Service providers enter a start date when job maintenance starts and potentially an end date (if additional coaching is required or the person leaves the job) for that specific job, only.

Job Coaching		Job Maintenance	
Start	End	Start	End
02-Nov-25	10-Nov-25	11-Nov-25	

Note: For every job that an individual holds, service providers must indicate whether the individual is receiving Job Maintenance or Job Coaching, by entering a start date / end date. Individuals ca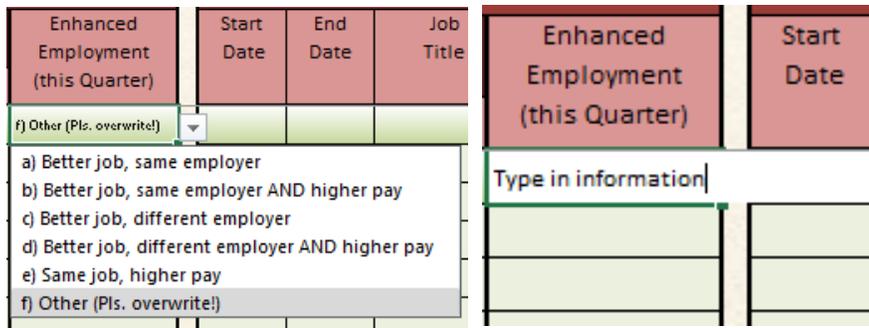n start and end job maintenance or coaching within a quarter, so both can happen within a quarter, they just can't happen at the

same time.

Enhanced Employment

Job enhancement is when an individual:

- ✓ Pursues and expands responsibilities or tasks in their current position which advances their skills and job prospects, positions them for a new opportunity, wage increase, advantageous schedule, or a promotion within the same employer.
- ✓ Enhanced employment can occur with or without assistance from their L.I.F.E. Service. It is important to (whenever possible) track these outcomes and/or milestones.
- ✓ The service provider would choose, from the drop-down menu, the best description of the enhancement. If 'other' is chosen, overwrite the description in the cell. Click on the individuals Enhanced Employment (this quarter) cell, and type in the information.
- ✓ Employment related information could also be included in the comments section of the PRL.

Enhanced Employment (this Quarter)	Start Date	End Date	Job Title
f) Other (Pls. overwrite!) ▾			
a) Better job, same employer			
b) Better job, same employer AND higher pay			
c) Better job, different employer			
d) Better job, different employer AND higher pay			
e) Same job, higher pay			
f) Other (Pls. overwrite!)			

Enhanced Employment (this Quarter)	Start Date
Type in information	

Note: Mandatory pay increases, because minimum wage has increased or if employers need to address conditions legislated by the Employment Standards Act (like ensuring minimal break requirements), would not be included as Job Enhancement.

Employment Data on Report Tab

Quarterly and longitudinal employment related data can also be found on the Report Tab.
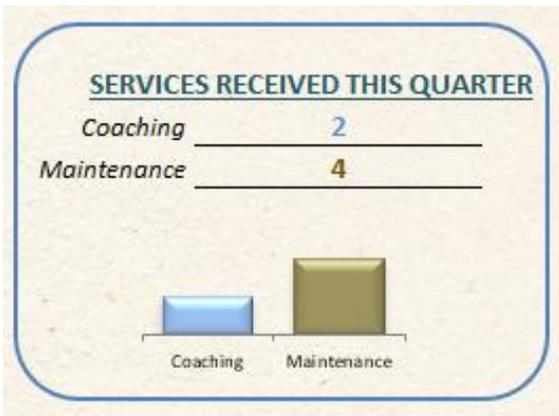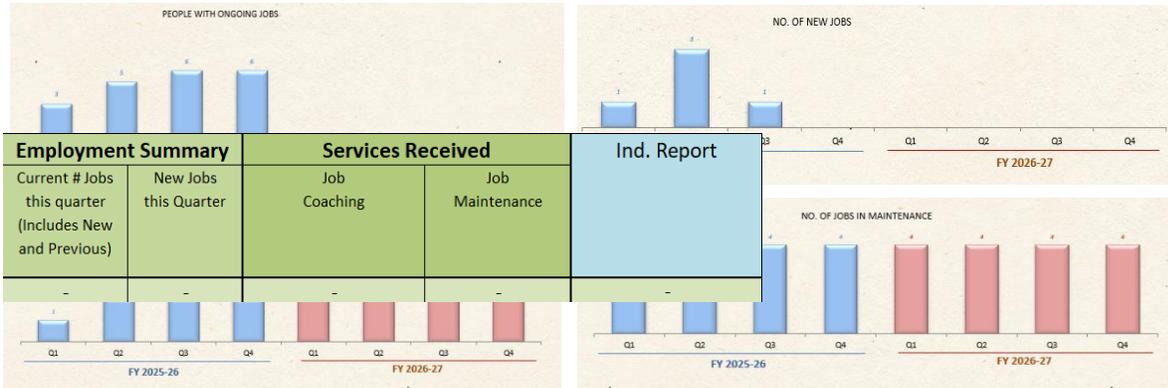
PART 2: EMPLOYMENT DATA

NUMBER OF INDIVIDUALS WITH ONGOING EMPLOYMENT AT END OF EACH QUARTER

Description	FY 2025-26				FY 2026-27			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
No. of Individuals with Ongoing Employment	3	5	6	6				

NUMBER OF NEW EMPLOYMENT EACH QUARTER

Description	FY 2025-26				FY 2026-27			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
No. of New Jobs Each Quarter	1	3	1					

Reminder:
The L.I.F.E. Service is for people that are interested in more than just employment.

Employment is the foundational cornerstone of a L.I.F.E. Service. Individuals that are referred to this service by CLBC need to be interested in paid employment (now or in the future).

Individual Level Summary Data (Report Tab)

Service delivery information is also found on the Report Tab of the PRL. This section consolidates service user data that pertains to the current quarter, and cross references the prior quarter to identify any service changes. * This section could serve as a quick reference, when reviewing PRL data.

PART 3: INDIVIDUAL LEVEL SUMMARY DATA

Person Served	Individual Profile					
	PRISM No.	DD/PSI	Gender	Age	Indigenous Identity	# Months Accessing LIFE
Alana White	100235	DD	Female	31	Yes	11
Jon Martinez	100234	PSI	Male	30	No	15
Lucas Gray	100241	PSI	Male	31	No	15
Maria Singh	100238	DD	Female	31	No	35
River Dela Cruz	100243	PSI	Other	35	No	42
Skyler Jones	100236	DD	Other	26	No	39

Service Usage/Changes				Responsiveness		Employment Summary		Services Received		Ind. Report
Direct A Hours Received this Quarter	Direct B Hours Received this Quarter	Change in Direct A Hrs from Last Quarter	Change in Direct B Hours from Last Quarter	# Check Ins this Quarter	# Tune Ups this Quarter	Current # Jobs this quarter (Includes New and Previous)	New Jobs this Quarter	Job Coaching	Job Maintenance	

Adding Individual Rows

The V7 PRL template contains 250 individual rows. These rows will appear in increments of fifty, to avoid any confusion. When a service provider has filled their available rows, scroll to line 405 and click "add rows. This will add an additional fifty rows. (1-50 / 51-101 / and so on, up to 250 tabs). When all 250 rows have been filled, please contact CLBC for next steps.
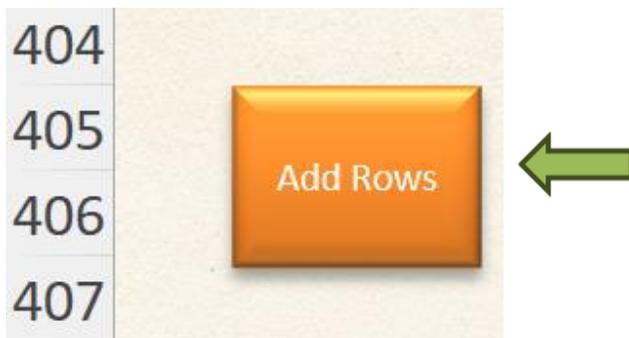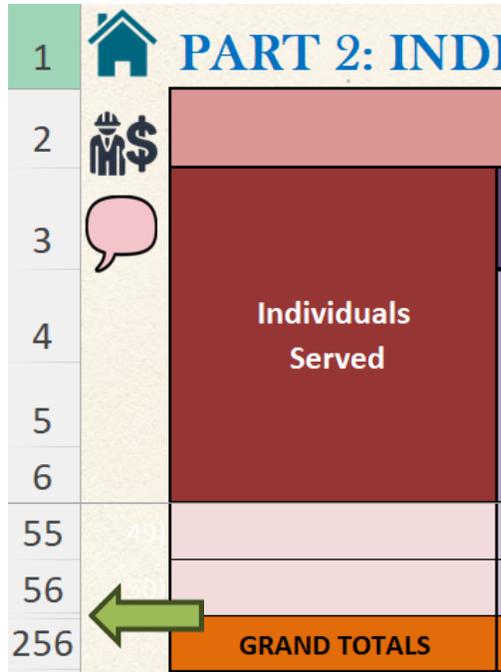
Step 3: Getting Ready to Submit Your PRL

Service Providers send their PRL(s) each quarter to CLBC, by email. Once you have updated or entered new information for all active individuals on the Individual Tab, updated the header of the Report Tab, saved and named your report correctly, you are ready to submit.

Please follow the instructions below to add a password to your PRL.
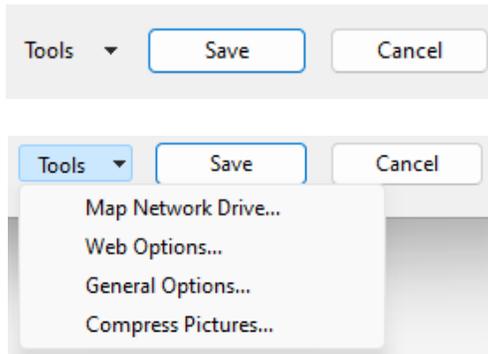
How to Password Protect your PRL

Follow the procedures below to password protect your Periodic report for L.I.F.E. Services (PRL):
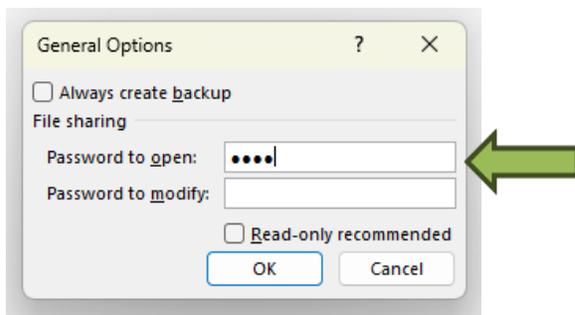
1. Click File / Choose Save As.

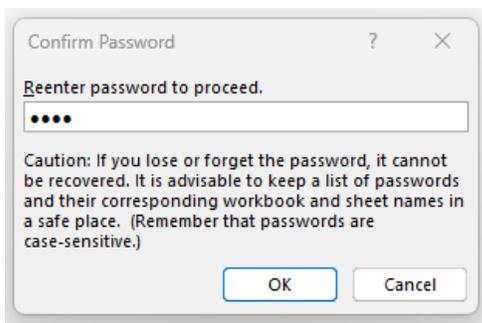2. File Name - use the required naming convention.

3. Click Tools + General Options.

4. Provide Password to open when prompted. The document cannot be opened without this password once this is created.

5. Ignore the Password to Modify section.

6. Click OK.

7. You will be prompted to Confirm the Password.

8. You will return to the Save As screen, click Save.

Submitting your PRL

Once your PRL has been protected by a password, the final step is to generate a Copy for Submission. * This is mandatory.

When you are ready, generate the 'For Submission Only' report by clicking on the button beside the # FTE/Potential Service Hrs. on the Report tab. The template will generate a separate report and automatically save itself in the same folder as the working copy (IE. LIFE Template 2025 – V7 FINAL) and name it with the Suggest File Name + FOR SUBMISSION ONLY. Please note the submission only copy has the macros removed and is disposable after it has been sent to CLBC.

Send your For Submission Only report, from your dedicated L.I.F.E. Service email, to: LIFEReportHelp@gov.bc.ca

Please do not send the password in the same email as your report.
- ✓ Send the password for your PRL in a separate email to LIFEReportHelp@gov.bc.ca.
- ✓ CLBC documents this password for future submissions.
- ✓ CLBC will keep the passwords recorded and tracked for each organization internally to expedite the reporting cycle.
- ✓ If you feel the report has been compromised, please change the password, and advise CLBC of the new password.
- ✓ It is also helpful to have a signature in the body of the email that includes contact information, as well as the name of the Liaison Analyst in case follow-up is required.

Appendix 1
Escalation Pathway

Timeline for submitting the L.I.F.E. Periodic Reports (PRL)

QUARTER	REPORTING PERIOD:	PRL DUE ON:
Q1	January 1 to March 31	April 15
Q2	April 1 to June 30	July 15
Q3	July 1 to September 30	October 15
Q4	October 1 to December 31	January 15

Escalation Pathway

Escalation Level	Escalation Pathway for Regional Action
Level 1: Service provider did not submit PRL this quarter.	Regional follow up needed by Liaison Analyst. Direct contact recommended: 1. Explore reason for non-submission. 2. Specify to service provider that submission is required by or before next report due date. 3. Send email outlining course of action to LIFEReportHelp@gov.bc.ca
Level 2: Service provider did not submit PRL this quarter or prior quarter.	Regional follow up needed by PSA/SDM Service provider advised in writing of: 1. Non-compliance and status in escalation pathway. 2. Requirement to submit both reports on or before next report due date. 3. Send email outlining course of action to LIFEReportHelp@gov.bc.ca
Level 3: Service provider has not submitted PRL for three quarters in a row.	Regional follow up needed by SDM/RD Service provider advised in writing of: 1. Non-compliance and status in escalation pathway. 2. Requirement to submit all outstanding reports on or before next report due date. 3. CLBC may consider contract termination 4. Send email outlining course of action to LIFEReportHelp@gov.bc.ca