

CSIL Online Workbook

A Guide to Applying for and Managing

Choice in Supports for Independent Living



Executive Summary

Prepared by BC Paraplegic Association
Funded by BC Ministry of Health



Table of Contents

Click on any subject to jump to that page of the Workbook.

Module 1 Summary What is CSIL and is it for you?.....	3
Module 2 Summary How to Apply for CSIL	4
Module 3 Summary How to be a Successful CSIL Employer	5
Chapter 1 Setting Up	6
Chapter 2 Budgeting and Reporting	6
Chapter 3 Making CSIL Your Own.....	7
Chapter 4 Hiring Staff	7
Chapter 5 Managing CSIL.....	8
Conclusion	9



Module 1 Summary

What is CSIL and is it for you?

Choice in Supports for Independent Living (CSIL)—pronounced “SEE-sul”—is an alternative way for home support clients to receive home support services.

The goal is to provide more choice and flexibility to people with disabilities who have high-intensity care needs. Funding for eligible CSIL clients comes from local health authorities.

To be eligible for CSIL, you must first be eligible for provincial home support services. There are also additional eligibility criteria for CSIL—a health authority case manager will meet with you to discuss your needs, and your eligibility for HCC services and CSIL.

CSIL employers receive funds to purchase their own home support services. They manage, coordinate, and are responsible for recruiting, hiring, training, scheduling and supervising home support workers. So, under CSIL, you assume the role of an employer with all of the rights and responsibilities that involves—or you can delegate this responsibility to a Client Support Group or a representative.

People who have a certain level of income pay a “client rate” toward their home support. However, about 70% of home support clients do not need to pay a client rate.

A health authority case manager can inform you about your home support options, including CSIL.

There are two Phases of CSIL: Phase I is for people who manage their own services. Phase II is for people who need some assistance to manage CSIL and will form a Client Support Group to fill this role or have a representative. Both Phases have requirements that you must meet to be eligible.

CSIL gives employers greater control over aspects of their services: choosing assistants that fit their needs and personality, and prioritizing tasks, work schedules and more. To be a successful CSIL employer, you need a particular skill set and the willingness to devote time to organize and manage your services.

Many people who are doing well on CSIL did not have all the necessary skills before they began. They learned new skills before applying, took courses or delegated tasks to experienced helpers—but they understood the skills needed to manage CSIL.

For eligible individuals who are able to do the extra work, CSIL is an option that offers greater independence, choice and flexibility.

For more information about CSIL and the eligibility criteria go to www.health.gov.bc.ca/hcc/



Module 2 Summary

How to Apply for CSIL

There are six steps in the process of applying for CSIL. It takes time to develop strong resources for your application, but they will increase your chances of success and will be useful to you if and when you are using CSIL.

Step 1 in the process is choosing whether to apply for CSIL Phase I or Phase II. Module 1 of this Workbook describes the differences between these Phases.

Step 2 is developing your Supported Lifestyle Plan. This plan creates a comprehensive picture of your needs by documenting all the tasks you need assistance with. It forms the basis of your discussions with your case manager and will help determine the number of support hours you will receive funding for from the health authority.

For Step 3, you will create a back-up plan for times when your assistants cannot work.

Once you have these resources in place, you're ready for Step 4 - the application. Each health authority has its own application process, such as an application letter or application form. In your application, show that you understand CSIL and its responsibilities, outline why you're a good candidate and list any steps you've taken to prepare for being on CSIL.

For Step 5, your case manager will meet with you in your home to discuss your needs, your eligibility for services and your eligibility for CSIL. Have your resources with you and be ready to discuss why you want to be on CSIL and why you would be successful. Your case manager will make a recommendation on your CSIL application to the local CSIL coordinator. The coordinator will contact you with the decision about your CSIL application and about your assessed hours.

Step 6 is the waiting period. While you're waiting for a response to your application, you may do some early preparation for CSIL, such as finding a bank for your CSIL account or writing an employee job description.

If you are accepted for CSIL Phase I or Phase II, you will receive an employer package explaining what to do next.

If you are denied or feel your number of assessed hours is too low to meet your needs, you have the right to appeal the decision. Each health authority has its own appeal process, so ask your case manager for details for your region.



Module 3 Summary

How to be a Successful CSIL Employer

Congratulations on becoming a CSIL employer! You're about to join the community of people with disabilities who enjoy the flexibility that CSIL can bring.

As we start this Module, we would like to emphasize one point that will go a long way toward preventing a range of possible difficulties.

When you become a CSIL employer, you sign an agreement with your local health authority and agree to certain conditions that we will look at in detail in this Module. For now, it's important to understand that by signing the agreement, you agree to:

- use CSIL funding in certain ways
- report to the health authority monthly
- be a lawful employer

Most CSIL employers meet these obligations and do well on CSIL. When problems occur, they generally flow from not understanding or fulfilling these basic responsibilities.

How to Succeed on CSIL

We would also like to suggest a few key ideas as you start this Module—ideas about the most important skills or attitudes you can develop in order to manage the various aspects of CSIL, including how to:

- become a good communicator.
- learn what's most important and how to prioritize.
- be organized.
- develop and keep to routines for your CSIL activities, such as managing assistants, record keeping and reporting.
- be the boss, but also be flexible.

Chapter 1 | Setting Up

When you become a CSIL employer, it is similar to starting a home-based business. It takes time to prepare for CSIL and become familiar with the various parts of managing your services. Don't expect to understand the ins and outs of CSIL overnight.

Your Employer Package includes the documents you need to set up your CSIL bank account, your agreement with the health authority and information on registering your Client Support Group or representative if you are on CSIL Phase II.

Your CSIL funds must be kept in a separate bank account and withdrawals made only by cheque, so you can easily track all expenses. Your bank can help you to set a suitable account.

There are also some requirements for the people who will act as your Client Support Group (CSG) or representative. For example, they must have the necessary skills to manage CSIL and they cannot be paid for any services related to CSIL. Your Client Support Group is registered as an incorporated society by using the documents in the Employer Package.

Once you've followed all the steps in this Chapter, you've finished the initial set up stage for CSIL.

Chapter 2 | Budgeting and Reporting

As a CSIL employer, it's your responsibility to keep accurate financial records, manage payroll and deductions, and report monthly to the health authority. Therefore, we recommend that you either have an experienced person do your CSIL bookkeeping (that can be paid for out of CSIL funds) or you consider taking some bookkeeping training.

You can find your employer resources and requirements from three key agencies: Canada Revenue Agency (payroll and how to calculate most deductions), WorkSafeBC (your WorkSafeBC remittances) and Employment Standards Branch (requirements for being an employer, such as hours of work, vacation pay and record keeping). As an employer, you also need to be aware of optional benefits, handling staff terminations and preparing Records of Employment.

Budgeting your CSIL funds, and keeping your budget on track, will be straightforward if you remember these simple rules: know your CSIL income, know your CSIL expenses and use CSIL funding only for approved expenses. If you have income over a given amount per year, you are required to make a contribution, called a client rate, for your home support services.

You'll monitor your monthly spending for both surpluses and deficits. You are allowed to have a surplus of up to one month of CSIL funding, although two weeks is enough in most cases. If you find you are overspending, you need to quickly identify why, to correct for the next month.

If you are consistently overspending, it may mean that your needs have changed. If you are consistently under budget, you may have been allocated more hours than you need. In either case, talk to your case manager about your budget concerns.

The Monthly Financial Statement is your routine report to the health authority on your CSIL spending. It reconciles your bank statement with your records of CSIL income and expenses.

Chapter 3 | Making CSIL Your Own

This Chapter describes the main planning areas you need to cover before you advertise for staff.

First, you need to spend time thinking about what you're looking for, and what your needs and personal preferences are. CSIL gives you the freedom to fit services to your needs, so give this some thought before you begin looking for staff.

Design your own job description: a how-to guide for your staff on exactly what the job involves. The Supported Lifestyle Plan you created in Module 2 is a good start for writing your job description. Another great tool for you and your staff is a set of Employee Guidelines that clearly state your expectations of staff beyond the job description. Take time to create Employee Guidelines that cover what is important to you from being on time, to not smoking in your house, to respectful communication, etc.

The Employment Contract brings all of your staff rights and responsibilities “under one roof.” The Contract will tell staff when they are paid, the probationary period, when evaluations occur and any other requirements you have. Both you and the employee sign the Contract and you keep it in the person's file.

Before hiring staff, you'll need a basic idea of how to schedule shifts and the type of staff to look for (part-time, full-time or live-in). Your Supported Lifestyle Plan will give you a good idea of what your staff shifts will be—at least enough of an idea to advertise for employees. Scheduling is discussed in more detail in Chapter 5 of this Module.

Part-time, full-time or live-in staff—or hiring family members as staff—are options you can consider when hiring. There are pros and cons to each, as well as legal requirements to follow. The Employment Standards Branch and your case manager can provide information to help you decide on your best option.

The final piece of information for your hiring process is the length of your training period. Most CSIL employers have a training period of two days to one week and hiring an employee depends on a positive training period.

Chapter 4 | Hiring Staff

Hiring begins with writing simple, informative ads and posting them in a variety of places. Post free or paid ads in newspapers, or find staff through word-of-mouth and community organizations.

Before you begin in-person interviewing, you need to screen the resumes you have received and select the best candidates. There are certain things to look for in resumes that will tell you something about the applicants, such as how often they change jobs or if there are long gaps where no job information is given.

We recommend pre-interviewing your chosen candidates by phone to select the most promising for an in-person interview. We have covered some suggested questions for the pre-interviews, as well as ways to record the results for later consideration.

For in-person interviews, develop a set of interview questions to ask each applicant. There are recommended areas to cover in the interview, such as a clear job description, your expectations, and the applicant's experience and availability for work.

In addition to the questions you ask, it's important to set a professional and friendly environment for interviews, so you can put people at ease. Allow the person to express their personality so you can learn something about them beyond their resume.

When you've finished your interviews, choose the applicants who you feel would make good employees and contact their references. Follow the process in this Chapter to gather the same information from each person's references. When you've made your final choice(s), offer the applicant(s) the job by phone or email and let them know of any final checks you require before finalizing employment, such as a medical check.

When an applicant accepts your offer of employment, ask them come in to sign an Employment Contract and fill in other forms, such as a TD1 for your files. Finish off your paperwork by creating an employee file for each new staff member.

Chapter 5 | Managing CSIL

It's important to understand your communication style and become an assertive communicator. Respectful and constructive communication is one of the most important skills you can develop as an employer. It creates a pleasant environment that makes coming to work enjoyable for employees. It also increases people's understanding of your preferences and needs, and it enables you to better understand your employees' needs and ideas. Small issues or misunderstandings between you and your staff can be resolved before they become big issues.

Staff orientation and training begins in the new employee's training period and continues during the person's employment with you. We provide some orientation tools and tips for you to use to give staff a good understanding of the job and all the necessary tasks. Involving one of your experienced assistants in the training, can be the best way to pass on the how-to's of your services and the work spaces in your home. Be clear and patient during the training period, giving staff time to learn and ask questions.

Your assistants' schedule is also something that's adjusted over time. Your needs may change, you may learn new ways to combine tasks and save time, and you'll discover the strengths and weaknesses of your staff and the best times to schedule them in. Try a schedule for a least a couple of months, so your staff have a dependable work schedule.

We recommend having some daily and weekly checklists, so staff always know what needs to be done and you have a way to track progress. These forms are simple to create and will give you the information you need to stay informed on areas for improvement or praise, as well as hours worked or time staff have taken off.

Remember that it's very important to have a list of back-up staff for times when staff aren't able to work. This includes a home support agency as the final back up, should all your other replacements be unavailable.

It's also important to find some non-financial "perks" for your staff to make their employment with you a positive experience. There are many small ways you can do this and they can make all the difference to the quality of your relationship with your staff and the length of their employment with you.

Take time to do regular performance evaluations with your staff. This doesn't need to be a long process, but doing this twice a year will let staff know that you want to maintain good work performance, give staff the opportunity to share ideas or issues and praise areas where staff are doing well.

If situations arise where there are disputes with staff, your understanding of assertive communication will be a valuable resource. Do your best to be clear about problems, listen to your staff's point of view and decide on clear actions to resolve problems. You'll need to handle disputes with professionalism, so keep written notes of discussions with staff. If problems continue, you may consider terminating the employee and some written records of discussions will be needed. There are things to consider before you terminate someone and a process to follow, to make necessary terminations as professional as possible. If this is your decision, be sure to follow Employment Standards Guidelines on terminations.

Disciplinary notes, termination letters and other documents related to each of your employees must be kept and kept private.

Finally, if for some reason you are leaving CSIL or moving to another province or country, talk to your case manager well in advance. If you are moving to another location within BC they will advise you on the services available in the city you're moving to.



Conclusion

Being a CSIL employer takes time, especially at the beginning when you're finding your way. But the benefits of CSIL are obvious, people who go on CSIL discover a level of freedom and control that is life-changing.

Our intention with this Workbook is to give you all the information you need at different times in your transition onto CSIL. It's possible you may feel a bit overwhelmed at times looking through these pages! It's true there is a lot to know and learn.

But, do remember:

- The vast majority of CSIL employers think the effort involved is more than worth it.
- You don't have to learn everything at once. Do the most important things first and learn as you go along.
- If you work on some of the key tools we recommend in the Workbook, like the Supported Lifestyle Plan, they'll be a great help in planning different parts of your CSIL services.
- Find support for the tasks you find the hardest.
- Come back to this Workbook when you need it: e.g., when you want to learn how to write an ad, plan your weekly schedule or write an employment contract.
- Don't try to do it all alone. Find people to help you plan, brainstorm and manage CSIL.

Good luck!