

CSIL Online Workbook

A Guide to Applying for and Managing
Choice in Supports for Independent Living



Module 2

How to Apply for CSIL

Module 1 | What is CSIL and is it for you?

Module 3 | How to be a Successful CSIL Employer

Prepared by Spinal Cord Injury BC
Funded by BC Ministry of Health



About This Online Workbook

This three-module Workbook is a how-to resource for Choice in Supports for Independent Living (CSIL).

Module 1

What is CSIL and is it for you?

Module 2

How to Apply for CSIL

Module 3

How to be a Successful CSIL Employer

Appendices

Documents, resources and glossary

Executive Summary

Forms Package

Word document with editable forms

CSIL is a self-directed option for eligible home support clients in BC to receive their home support services. CSIL clients are people with disabilities who have high-intensity care needs who receive funds from their local health authority to purchase their own home support services. They become “employers” who manage all aspects of their home support from hiring and supervising staff to overseeing how CSIL funds are spent. People who cannot manage CSIL on their own are eligible through a Client Support Group or a representative.

Although the CSIL option may not suit everyone, people who receive home support services through CSIL enjoy the level of freedom and flexibility it provides. They have control over who they hire to provide personal assistance, when services are scheduled to fit with their lifestyle, and how tasks are carried out. Through CSIL funds for personal assistance come directly to the person for the personal assistance they need. The success of CSIL is a credit to how individualized funding supports independence and choice.

This Workbook is a guide for people who want to know more about CSIL: people who already receive home support services, those who intend to apply for home support services or current CSIL employers who want support to manage CSIL.

CSIL can change people’s lives, and this Workbook will educate people on both the responsibilities and benefits of the CSIL option.

Module 1 explains what CSIL is and who is eligible. **Module 2** gives step-by-step information on how to apply. **Module 3** takes you through the detailed process of setting up and maintaining all aspects of CSIL, including many self-help resources and forms you can use or adapt to your needs.

Good luck in your exploration of CSIL.

CSIL Online Workbook
Prepared by Spinal Cord Injury BC

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How to Use this Workbook

This Workbook is over 150 pages in total, with over 130 pages in Module 3. We recommend you read the shorter Modules 1 and 2 first. Then, if you want to know more about a certain aspect of CSIL, choose a chapter or a topic that interests you in Module 3 and start from there.

To move to and from the Table of Contents in the Workbook PDF:

- click on any topic in the Table of Contents
- click on the Back to the Table of Contents links at the bottom of each page

Finding information










Enter a search term in your PDF viewer, such as “payroll” or “hiring.”

To jump to outside resources:

- click on links to websites. Linked text may appear within a paragraph with text like this or through web links.

Chapter Images

We’ve used these images throughout the Workbook to organize the information and bring certain things to your attention.

								
Chapter Objectives	What You'll Learn	What Others Say	Topic In-Depth	Activity To Do	Important Tip	Chapter Summary	Chapter Review	Next Steps

In particular, watch for the hand image that mark Activities To Do. We encourage you to do these short exercises to begin to learn about CSIL responsibilities, how to tailor services to your needs and to problem-solve.



Watch for other suggested tasks in bullets like this.



This bullet style notes materials or references included in the appendices.

Resources

- Be sure to look through the appendices for additional documents, resources and a glossary.
- Download the Forms Package, a Word document that contains some of the key Workbook forms for you to use or adapt to your needs.



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How to Apply for CSIL



Module objective

In this Module, we explain the steps to follow to apply for CSIL Phase I or Phase II.



What you will learn

- The six steps in the CSIL application process.
- How to prepare the key resources you need before you apply, including a Supported Lifestyle Plan and a staff back-up plan.
- Why people who already receive home support may have their home support needs and hours reassessed before they apply for CSIL.
- What to include in your application.
- How to plan for and conduct your appointment about CSIL with your case manager.
- What happens next once your application is accepted or denied.



What other people have said

“People applying for CSIL should find out as much as possible about it and be prepared to do the work.”

“The most important part of the application process is the detailed care or services plan and building a good relationship with your case manager.”

“Outline your support needs noting every detail down to the minute. Spend most of your time on the compilation of a realistic plan with attention to including non-daily tasks as well as daily tasks.”

“Show that you’re organized, prepared and capable of managing staff. If possible, give examples of managing people for example, at work or volunteers who help you.”



The six application steps

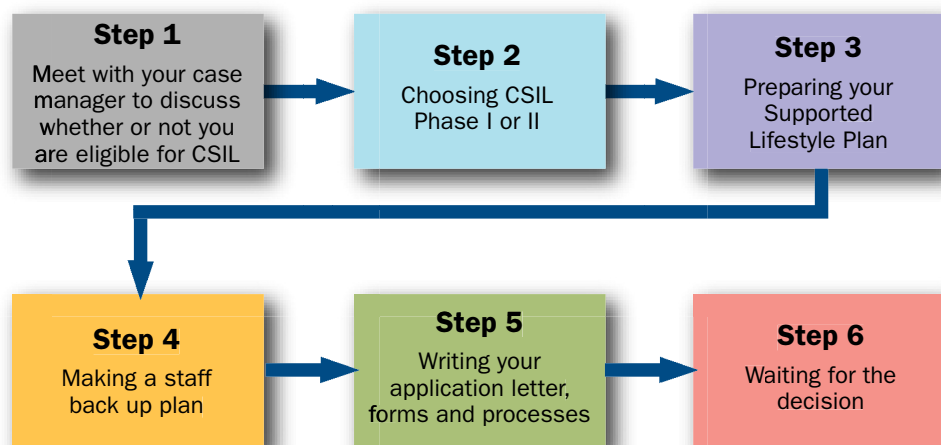
If you are eligible and choose to pursue the CSIL option of home support services, there are several steps in the application process. Following these steps will take you a long way toward a successful application, so don't rush this part of the process.

If you become a CSIL employer, you'll be able to use some of the materials you develop in this Module. For example, your Supported Lifestyle Plan that we discuss below, will help you to create a job description and task sheets for your assistants.



A complete application will be approved sooner. If you are missing information from your application it may delay the process.

Here are the applications steps we'll look at in this Module:





Before you begin

CSIL employers say that their lives are better and richer because they have control over their services, rather than having services controlled by someone else.

However, there are some questions to ask yourself if you're going to receive home support services and perhaps especially if you are thinking of applying for CSIL. For example, consider whether you're psychologically ready to have someone helping with your personal care and home support services.

Requiring some degree of help to manage your days is something that all of us, at some time, will need to come to terms with. It's easier for some people than others, but making the adjustment is necessary for your peace of mind and for developing a respectful and workable relationship with your assistants.

Am I ready to manage assistants?



Question	Yes or No?
Would I like to live a more independent lifestyle?	?
Do I accept that I need some degree of assistance in my life?	?
Am I ready (on my own or with my Client Support Group or representative) to supervise people in all the personal care tasks that need to be done?	?
Are there things that I love to do that would be easier with an assistant?	?
Can I talk to people clearly and factually about my health needs?	?
Would I like the freedom to hire staff?	?
Am I comfortable talking to people when problems arise?	?

Step 1 | Choosing Phase I or Phase II

The two CSIL Phases are the same, except for one important difference: who manages the CSIL services. Under Phase I, the person receiving the home support hours directs all aspects of service, including managing someone delegated to do certain CSIL tasks, such as bookkeeping. Under Phase II, a Client Support Group, or representative manages CSIL on behalf of the person receiving services. These options are described in detail in Module 1 of this Workbook.

Special considerations for Phase II

If you are applying for CSIL Phase II, there are some important things to know.

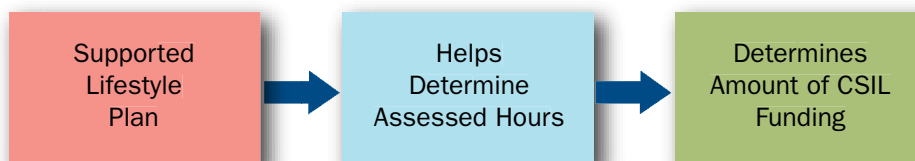
- ✓ Acceptable Phase II decision-makers are a Client Support Group and a Representative named in a Representation Agreement.
- ✓ The members of your Client Support Group or your representative, must have the skills to manage your staff and the ability to understand and communicate your needs.
- ✓ Ideally, your Client Support Group or representative should consist of people who know you well and support your lifestyle and preferences. They can be relatives, friends, neighbours, a doctor or anyone else who you trust and know will support your independence and your choices.
- ✓ They must be at least 19 years of age and at least one must live within your community to physically assist with managing CSIL.
- ✓ A CSG must be incorporated as a non-profit society, **but not before you are formally accepted on CSIL.** Information on how to do this will be included in your acceptance package.
- ✓ You cannot pay anyone acting as a representative or a member of your Client Support Group for any services.
- ✓ We recommend that the people on your Client Support Group be willing to commit to at least one or two years to assist you. You should also have two or three other people who can step in if someone on the Client Support Group drops out. The six steps in this chapter apply to both CSIL Phases. However, for Phase II, please see the section: Special Considerations for Phase II Applications.



Review the criteria for Phase I and II and decide which option best suits your needs.

Step 2 | Preparing your Supported Lifestyle Plan

This step may be the most important in the application process. Why? Because the personal support needs you document helps to determine the number of home support hours you are assessed for. This, in turn, determines the amount of CSIL funding you receive from the health authority.



Your Supported Lifestyle Plan is a detailed list of all the personal care tasks you require assistance with each day and the time each task takes to complete. This is sometimes called a “care plan” or “personal care plan.” The plan provides the basis for discussions with your case manager about your eligibility for CSIL and for the number of support hours you require.

If you have already been assessed for your support hours, we still recommend that you complete a plan. You may find that you are eligible for more support and asking for a reassessment of your hours will be worthwhile.

Or, the health authority may reassess you when you apply for CSIL. If it has been quite a while since your last assessment, your health or housing has changed or your personal support plan has changed, the health authority may reassess you as part of your application for CSIL.

If you have not yet been assessed, the Supported Lifestyle Plan is your place to start. **Create an accurate and comprehensive picture of your daily routine and health care needs. Ensure that all the care tasks you need done are included.**

Please note that the health authorities do not have a list of “approved tasks.” The tasks your personal assistant will be authorized to do for you depends on a range of factors, such as your specific care needs, other available supports and services where you live, and your care needs.

Here are the steps to creating your plan.

1. Go through your day listing all morning, afternoon, evening and overnight care tasks that you need assistance with in a normal day. Brainstorm all the tasks in the list first; don’t worry about the time required yet.
2. Include “good days” and “bad days” in your plan to have a realistic assessment of your routines and care needs.

3. Then, look at each care task, for example, bathing, eating, bowel/bladder routines. Break each task down into all of its sub-tasks and assign a time to each one. Be thorough.
4. Include daily care tasks, like those we've mentioned above, and tasks that are done less often, for example, passive stretching that you need three times a week.
5. Remember to include care tasks that other people, such as family or institution staff, do for you. For example, if your mother comes by to help you shower every day or the hospital staff where you've been living provide stretching three times a week. All these tasks will be part of your assessment of needs.
6. Keep in mind all of the activities that are important to you, such as being active in your community, and include the personal assistance you need to make this possible.

Home support services supplement support provided in the community. This means that, if you have other support available to you, such as your family, you will need to tell your case manager what they can or cannot do to assist you and why.

It is important to be realistic about what they can do. For example, can your father help you transfer twice a day, every day?

Here's an example of the kind of detail you should document for each care task.

Morning Daily Tasks			
Morning Routine			Time per day
Transfer from bed to commode chair using ceiling lift		=	10 mins.
Toilet routine	During routine, prepare breakfast, wheelchair, bed with towel and pillows	=	20 mins.
Shower, including shampoo, body, shaving		=	20 mins.
Transfer from commode chair to bed using ceiling lift		=	10 mins.
Dry body off		=	5 mins.
Skin care/medicated cream		=	8 mins.
Dressing		=	10 mins.
Transfer from bed to wheelchair using ceiling lift		=	10 mins.
Hair care		=	2 mins.
Feed breakfast		=	15 mins.
Clean up from breakfast/shower, put items where can be reached		=	10 mins.
Total		=	120 mins



Use the form below to describe one of your daily tasks.



Afternoon		
Task _____		
Sub-Tasks		Time per day
Total		



Create your own form to identify every care task (and its sub-tasks) that you require help with daily and weekly. When you're done, your plan should be a few pages long.

Step 3 | Making a staff back-up plan

CSIL employers need to plan for times when their primary assistants are not able to work. You need to create a solid back up staff plan before you apply for CSIL.

Here is a simple format that we recommend. Adapt it to your particular needs, but be sure to build in the kind of safeguards we list here.

1. I have three members of my staff who will cover seven days per week.
2. If one is sick, I will contact the other two to see if they can come in.
3. If these two options fail, I have a list of friends on CSIL who are willing to share their back-up staff.
4. I have three people among my family and friends who can do some basic tasks for me in an emergency.
5. I have a written agreement with an agency for emergency support, if the above steps fail.



My Back Up Plan	
I have _____ members of staff who will cover _____ days per week.	
If...	I will...

Step 4 | Writing your application letter or form

Now you're ready to write a letter or fill in the application form to apply to the health authority for CSIL. The application letter can be short, but it should cover these topics.

- ? Why you want to be on CSIL.
- ? Why the CSIL service option would work well for you.
- ? What you understand about being a CSIL employer.
- ? What skills or experience you have that would help you manage CSIL.
- ? What initial steps you've taken to prepare for CSIL.



Use this table to write the main points of your application letter

Why do you want to be a CSIL employer and why are you a good candidate?
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
What are the responsibilities you will have as a CSIL employer?
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
If you are applying for CSIL Phase II, do you have someone to act as your representative or five people who could serve as your Client Support Group?
<input type="checkbox"/> Yes <input type="checkbox"/> No
Describe any experience or skills you have that will help you be a good CSIL employer. For example, have you supervised staff before?
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

List any first steps you have taken to prepare, such as starting employee task sheets or training guidelines.



Now, write your letter using the information from this form. See the sample Phase I and Phase II letters on the next pages.

When your letter is done, mail or deliver it to your health authority. Congratulations and good luck!

Sample Application Letter | Phase I

October 22, 2010

Jane Smith
222 Main Street
Kamloops, BC
V3R 3R3

John Martin, Case Manager
Home and Community Care

Re: Applying for Phase One of CSIL

Dear John:

I would like to apply for the CSIL option for my home support services. I would like to have more control of my personal assistants and the scheduling of my services.

I have an excellent understanding of the requirements of being a good CSIL employer and understand my responsibilities to the health authority that go along with being a CSIL employer. I have had some relevant experience that will be helpful, including acting as Treasurer in my housing cooperative and supervising employees in my current job. I've also read the CSIL Online Workbook that explains how to manage CSIL in detail.

I have taken some first steps to prepare for CSIL, including finding a book-keeper and starting a list of employee guidelines.

Thank you for your time and consideration. If you have any further questions please contact me at 444-444-4444.

Yours sincerely,

Jane Smith

Sample Application Letter | Phase II

January 10, 2010

Sam Turner
5555 Broadway
Vancouver, BC
V6T T3T

Leslie Winters, Case Manager
Home and Community Care

RE: APPLYING for CSIL Phase II

Dear Leslie:

My daughter, Lillian, would like to apply to be on CSIL Phase II. We would like to manage her home support services to best serve her particular needs.

We have an excellent understanding of the requirements of being a good CSIL employer and understand the responsibilities we will have to the health authority to manage CSIL funding and reporting.

We have five people in mind to act as her Client Support Group. We also know someone with bookkeeping experience who we plan to hire to manage the CSIL accounting for us. I have selected a bank to set up the CSIL account.

Collectively, the Client Support Group has a range of skills that will help us act wisely, responsibly and effectively. These skills include running a home-based business, supervising employees, human resources experience, as well as years of experience with Lillian herself.

Thank you for your time and consideration. If you have any further questions please contact me at 999-999-9999.

Yours sincerely,

Sam Turner, On behalf of Lillian Turner

Step 5 | Meeting your case manager

Some people who apply for CSIL already receive home support services and want to switch to CSIL. Others do not receive home support yet, but have heard about CSIL and want to apply directly for the CSIL option. Whichever situation is true for you, a case manager will meet with you to talk about your home support needs and your eligibility, and help to develop your personal supports plan.

After your case manager receives your application forms and letters, they will contact you to schedule a home visit. They may ask you to have certain documents with you for the visit; for example, your BC Care Card, your most recent income tax return or your medical information on your condition or disability.

The purpose of the home visit from your point of view is to:

- ✓ communicate your needs clearly so your case manager has the best information possible to assess your eligibility for home support hours
- ✓ let your case manager know you are interested in the CSIL option
- ✓ discuss the benefits and responsibilities of CSIL with your case manager
- ✓ ask about resources and assistance available to you if you qualify for home support services.

The purpose of the meeting from your case manager's point of view is to:

- ✓ assess your home support needs and your eligibility for services, including CSIL
- ✓ assess your ability to direct and manage your services
- ✓ evaluate the safety and suitability of the working conditions in your home
- ✓ assess your client rate, if applicable. This is a calculation of how much you must pay toward your home support (whether you receive services through CSIL or an agency), if your income is above a certain amount.
- ✓ provide you with information and resources about CSIL and standard home support services, including community resources, should you decide to proceed with the application.
- ✓ begin developing a home support plan for you.



If you qualify for home support services, you may be eligible for a range of home and community care services including community nursing and community rehabilitation. Visit the [Home and Community Care website](#).

Your home visit or assessment

✓ **Arrange a date for a home visit.**

Gather the resources you have put together and prepare for the appointment. You can have someone at the home visit with you if you like, a trusted person who can ask questions or remind you of certain things you want to discuss with your case manager.

✓ **Discuss your needs using your Supported Lifestyle Plan.**

Give a copy of your plan to your case manager and discuss the details with them. The case manager will assess your needs, determine your eligibility for home support (if you do not already receive support) and assess whether or not you're eligible for CSIL. **Remember to ask questions or explain your needs in detail.** The case manager will do their best to meet your needs, based in part on your plan.

Because home support is intended to supplement services provided by your family or social network, your case manager may ask if your family or network can provide any of your services. So, before the meeting, look at your Supported Lifestyle Plan to see if there are any tasks your family or network could perform. Remember to be realistic about what people in your support network can do to assist you on an ongoing basis. Tell your case manager if they can or cannot help you and why.

✓ **Be honest and be realistic.**

It's important in this process to be as clear and realistic as possible. For example, if you can shower yourself, but it takes a long time and is unsafe, you need to explain this and ask for help to shower.

✓ **Ask for information.**

Your case manager can help by referring you to or informing you about additional resources for CSIL, government resources, equipment sources, and so on.

The case manager will look at all the information and recommend to the local CSIL coordinator whether or not you are eligible for CSIL. The approval process can take from two weeks to three months. If you're well prepared and provide all the required information, the process will be faster.

Step 6 | Waiting for the decision

While you're waiting for the decision on your application, you may want to do some preparation, such as developing employee task sheets or training guidelines.

One note of caution: if you have an agency providing your services, and you are accepted for CSIL, wait until you have everything in place, before asking your case manager to cancel your service. If you have included the agency in your back-up staff plan, they may be willing to work with you to set up an interim services plan while you are switching onto CSIL.

Also, if you have a good working relationship with one of your assistants from an agency, it's possible they may be able to work for you under CSIL. However, agencies have rules around this, so be sure to ask the staff person or the agency about their policy.

Being accepted for CSIL

Once you've been approved for Phase I or Phase II, the health authority will mail you a CSIL employer package. If you qualify for Phase II, your package will include information on registering your Client Support Group or representative.

Module 3: How to Be a Successful CSIL Employer, describes in detail what happens after you're accepted for CSIL.

Appealing the decision

If your application for CSIL is denied, or you feel your approved number of support hours doesn't meet your needs, you have the right to appeal the decision. Each health authority has their own appeal process, so ask your case manager how to appeal this decision.



Module Summary

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

The first step in the process is choosing CSIL Phase I or Phase II. Module 1 of this Workbook details the differences between these Phases.

The most important step 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.

You will also need to create a back-up plan for times when your assistants cannot work.

Once you have these resources in place, you're ready to apply by writing a letter or completing the health authority application form. In the letter, 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.

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 do well. Your case manager will assess your eligibility for CSIL and notify the local CSIL coordinator. The coordinator will contact you with the decision about your CSIL application and about your assessed hours.

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, you have the right to appeal the decision. Each health authority has its own appeal process, so ask your case manager for details on the appeal process.



Chapter Review

What are the 6 steps in the application process?

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

What should your Supported Lifestyle Plan include?

Write a draft back up plan for your staff.

What information should your application letter include?

What is the purpose of the visit with your case manager?

What information should you bring to this meeting?



Next Steps

If you are accepted on CSIL:

1. Move onto Module 3 of this Workbook: How to Be a Successful CSIL Employer.
2. Set aside time to go through the Module and the included exercises.