

MEMO

To: Organizational Leadership Team, All Managers, Independent Facilitated Personal Planners
From: Dwayne Milley, Vice President of Operations
Date: April 22, 2024
Re: **Personal Plan Updates**

I am very excited about the updates to the Personal Plan process that will be effective May 1, 2024. We have been working on this for some time, in keeping with our goal that people will direct the services they receive from Karis Disability Services. This update will be fully integrated in AlayaCare, which helps us more easily support people as they work toward their goals.

These updates include:

- An updated **Personal Plan Form**, available **May 1, 2024**, which includes a new section called “My Finances” where a person can document how they choose to use their personal funding, including Passport funding (Ontario) and Personal Outcomes Funding (Saskatchewan) (In Ontario; this is a requirement if Karis is administering a person’s Passport funding).
- Beginning May 1, 2024, all new and updated Personal Plans will be completed in AlayaCare. The prior Microsoft Word version of the Personal Plan form will be discontinued on May 1 and will not be updated to reflect the Personal Plan form in AlayaCare.
- **Goals and Actions** for each person will be set up in the AlayaCare “Care Plan” (*please note, “Care Plan” is technical AlayaCare term which describes a section of the platform – we will still use the term “Personal Plan”.*) This work can begin now and should be completed by **August 30, 2024**.
- When a person has Passport funding (Ontario specific) or Personal Outcomes Funding (Saskatchewan), an Action will be required in the AlayaCare Care Plan to document each service that a person is choosing to purchase from Karis as described in their Personal Plan. This should be completed by **August 30, 2024**.
- Personal Plan signatures are now only required from the person who uses services and/or their designate (if required) and the Program Manager/Team Lead. Previously, the practice was signatures from all people participating in the Personal Plan process. We will continue to document in the Personal Plan all people involved in the Personal Plan process.

We have planned several learning opportunities to help you with this transition:

- **Webinar on May 3, 2024 at 1:00 pm EDT (11:00 am in Saskatchewan)**
 - o Required for Program Managers, Team Leads, Independent Facilitated Planners and anyone involved in personal planning
 - o Recorded and posted on LMS for those unavailable to attend

- **Updated AlayaCare Guide and Video Training**, saved with other AlayaCare resources on TEAMS and including modules on:
 - o Setting up Goals and Actions in the AlayaCare Care Plan
 - o Creating a Personal Plan in AlayaCare
 - o How to link a visit in AlayaCare to a Goal or Action for a person so we can track people’s progress
- **Guide for Passport** is moving into the LMS. This will provide training and updates about Karis’ approach to Passport Funding.
- Updates will be made to the following Pages on **CH Connect**
 - o [Person Directed Planning](#)
 - o [Services for Purchase & Passport](#)

Why are these updates important?

These changes allow us to document the important work we do every day to support the people to have more choice and control over their services, along with helping them continue to work towards their goals and actions. All of these are critical ingredients for belonging, social connections, and a sense of purpose in local communities. Additionally, it supports our work in both Ontario and Saskatchewan where we are preparing for MCCSS’ Journey to Belonging (ON) and participating in CLSD’s Outcomes Based Service Delivery Pilot project (SK).

As an organization, we have experienced significant change over the last year. Many of these changes, including the Personal Plan processes described above, mean we must do our work in new ways. I appreciate you for taking the time to learn and implement these changes in your role and as you support your teams.

If you have any questions about the updates to the Personal Planning process, please contact your manager.

Summary of Changes:

	Before May 1, 2024	After May 1, 2024
Personal Plan Goals and Actions	Microsoft Word – “S-06-01b Goals and Actions” Form	AlayaCare – Care Plan
Passport related Actions	NA	AlayaCare – Care Plan
Personal Plan Form	Microsoft Word Form “S-06-01a Personal Plan.doc”	AlayaCare Form “Personal Plan”
Personal Plan Approval	Upload copy to TAMS TAMS Item Approval	AlayaCare Form Approval TAMS Item Approval
Passport Planning in Personal Plan	In applicable sections of form	In applicable sections of form In new “My Finances” section of form
3.1 Passport Planning Tool	Uploaded in TAMS TAMS Item Approval	Uploaded in “My Finances” section of Personal Plan Form in AlayaCare

Please click [here](#) to register for the Personal Planning Updates webinar.