

IF Backbone Jurisdictional Scan

January 2024



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01.

IF Backbone Overview

A brief description of the project and an overview of what's involved in the IF Backbone, including the IF Service and the IF Tool.

The IF Backbone System | Definitions & Objectives

The **IF Backbone System** is intended to be a spectrum of supports for participants and can look different depending on what each participant needs. The system refers to both the **service** and **tool**.



The **IF Backbone Service** will be provided by an IF agency who is responsible for supporting participants with IF planning, budgeting, and reconciliation at varying levels of support.

The **IF Backbone Tool** would allow participants to independently manage administration, scheduling, coordination, coaching, service selection, budgeting and reporting.

This project aims to source a system that will help support participants to navigate individualized funding with a supporting backbone system. There are a few objectives we are working towards in support of this goal:

1. Procure a system that will enable any participant to navigate their funding
2. The procured system must work for both DSP participants and SLTC clients

The IF Backbone System | Key Terms

IF Backbone Agency

The central agency responsible for supporting participants with IF planning, budgeting, and reconciliation at varying levels of support.

IF Self-Managed

Participants who choose to manage their funds on their own through the IF system.

IF Agency-Managed

Participants who use the central IF agency to manage their funds.

IF Mixed

Participants who self-manage and use the IF central agency to manage their funds.

IF Service Provider

A service provider who is registered in IF Backbone to participate in the marketplace.

Individual

A person who is eligible for Individualized Funding through the Disability Support Program (DSP) or Seniors and Long-Term Care (SLTC).

Individual's Agent/Administrator

An individual acting on behalf of a program participant to administer IF.

IF Coach

From another project to help coach and support the participants find the right supports

IF Features

Features are the "tools" you use within a system to complete a set of tasks or actions.

02.

Key Informants

A breakdown of the key informants used to inform the research conducted, along with brief descriptions of each.

Key Informants | Other Jurisdictions

IF Tool

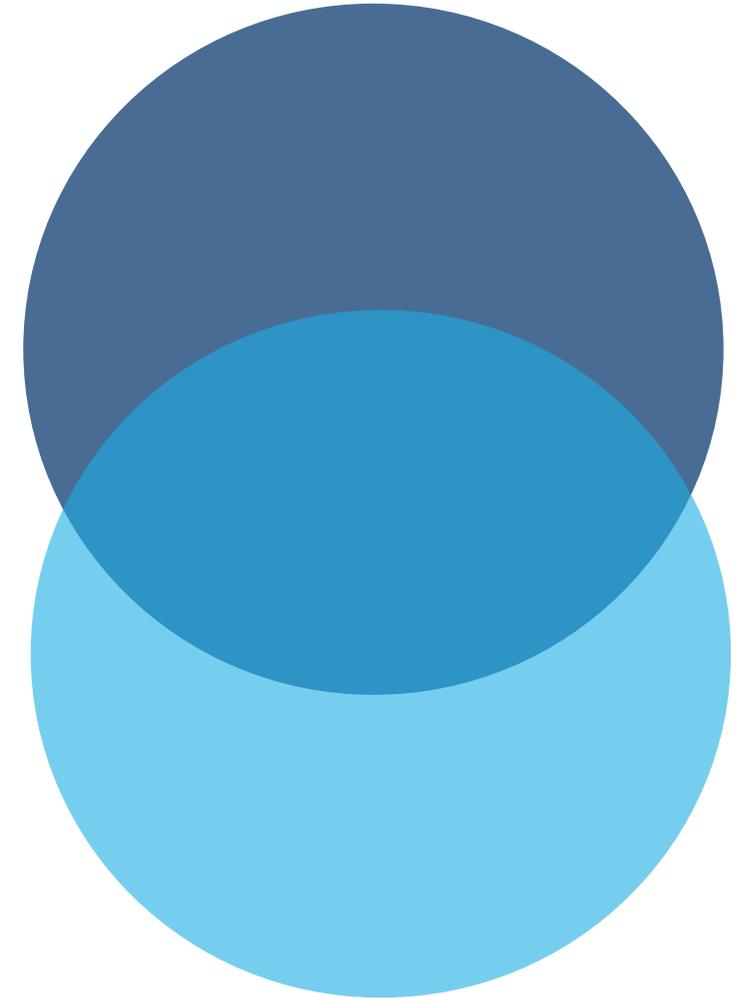
- CLBC Portal
- Passport eClaim (Passport Ontario)
- MyDirectPlan (Passport Ontario)
- Manawanui Portal
- AlayaCare Client Dashboard
- Penderel's Trust My View
- Share Vision

IF System (Tool + Service)

- Community Living British Columbia (CLBC)
- Passport Ontario
- Manawanui
- Penderel's Trust
- AlayaCare
- Momentum

IF Service

- Vela Canada (CLBC)
- Manawanui Self-Managing Service
- Penderel's Trust Corporate Appointeeship
- Momentum Developmental Support
- AlayaCare Family Portal



Community Living British Columbia | IF System

Community Living British Columbia

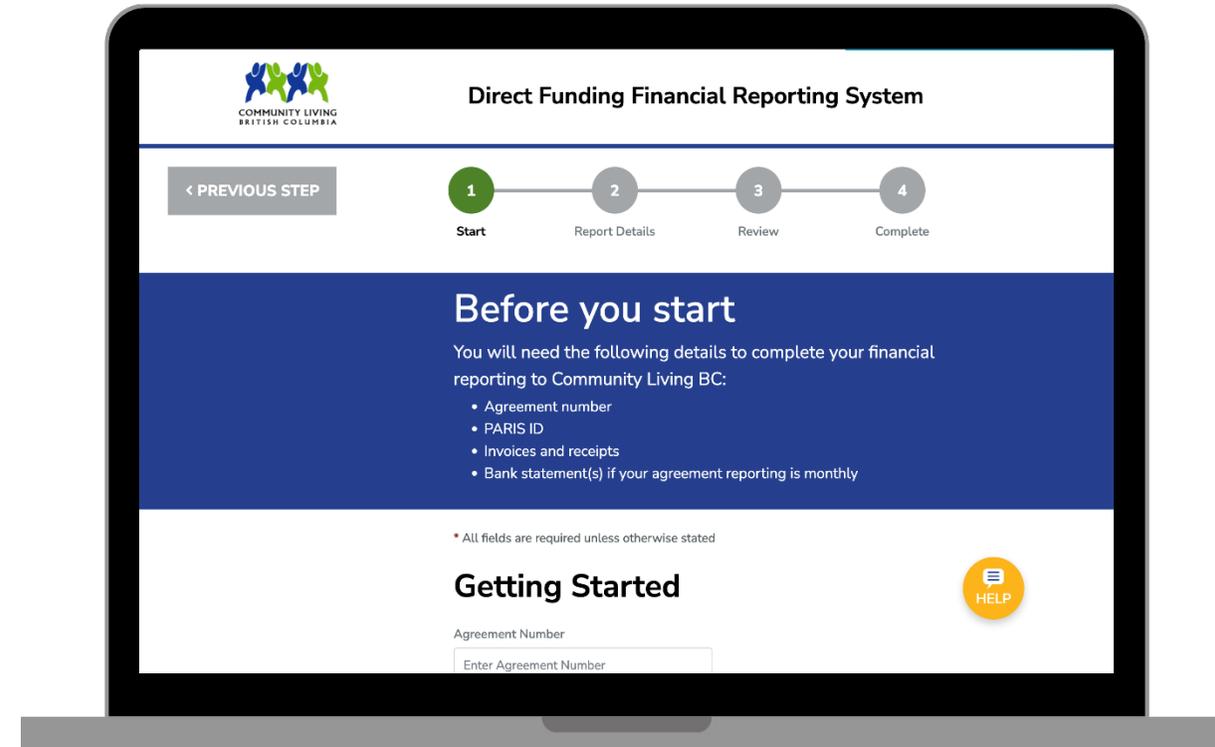
Community Living BC (CLBC) is the provincial crown corporation that funds supports and services to adults with developmental disabilities, as well as individuals who have a diagnosis of Autism Spectrum Disorder or Fetal Alcohol Spectrum Disorder and who also have significant difficulty doing things on their own.

Vela Canada (Service)

CLBC refers those who need support navigating the IF System to their funded service, Vela Canada. They assist people with disabilities to take greater control of their lives by forming a Microboard or accessing IF.

CLBC Portal (Tool)

A new online reporting system is making it easier for individuals and families who receive individualized funding directly to submit spending reports. Vela Canada helps with submitting these reports.



Based in: British Columbia
Other implemented jurisdictions: N/A

Manawanui | IF System

Manawanui

Manawanui provides participants with as much, or as little support as they need. Their easy-to-use digital tools make it as easy as possible for participants to manage their disability funding and the Customer Experience Centre and Coaches are there for additional support if needed.

Self-Managing Service (Service)

The Manawanui Self-Managing Service is an option for individuals who want to manage all their own support, with assistance along the way. The assistance usually comes in the form of coaching, budgeting advice, and expense services.

Customer Portal (Tool)

The Customer Portal is a suite of digital tools to help individuals with budgeting and expenses.

Our Services

Self-Managing Service

If you want to fully manage all your own support, our Self-Managing Service might be right for you. We get you started and assist you along the way, to the level you need.

This typically includes coaching support with budgeting advice, a reimbursement of expenses services, monthly statements and access to our Customer Portal with great digital tools to help with budgeting and expenses.

[Contact Us](#)

Based in: New Zealand
Other implemented jurisdictions: United Kingdom

Penderels Trust | IF System

Penderels Trust

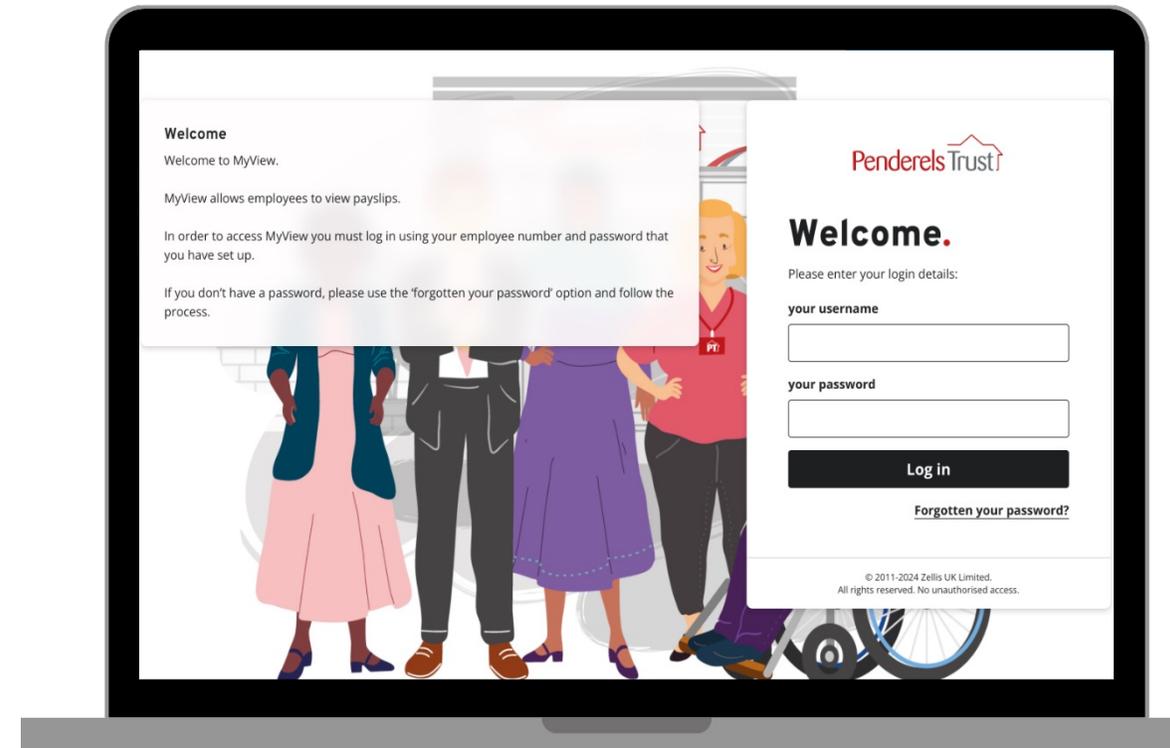
Penderels Trust is a non-profit based in Coventry, UK that offers advice, guidance and practical solutions to enable people with disabilities to live independently in their own homes, to achieve their goals in life and help them to play an active part in their community.

Corporate Appointeeship (Service)

Penderels Trust provides a Corporate Appointeeship service to individuals that need help managing their personal benefits. This is normally following a referral from the local authority social work team or from Department of Work and Pensions.

My View (Tool)

My View is an easy-to-use, online system that is accessed with a username and password. This means instead of waiting for payslips to arrive in the post or by email, you can log on and view payslips as soon as they become available, which will be the day before payday.



Based in: Coventry, United Kingdom
Other implemented jurisdictions: N/A

AlayaCare | IF System

AlayaCare

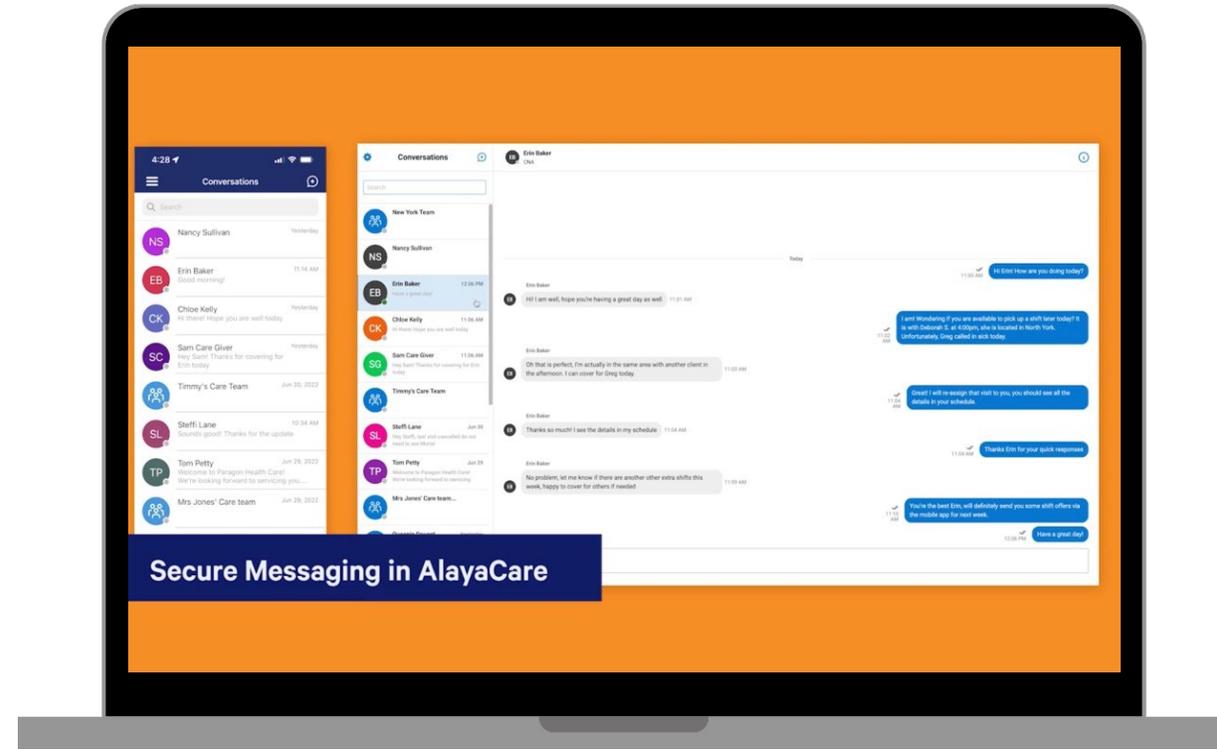
AlayaCare is an end-to-end software platform for public, private, non-profit and community home-based care organizations that manages the entire client lifecycle, including needs assessments, care plans, scheduling, visit and route optimization, and visit verification.

Family Portal (Service)

AlayaCare's Family Portal is a secure, integrated, online portal that provides clients, providers and authorized family members access to parts of their AlayaCare client health record to stay connected and engage in their care plan anywhere, at any time.

Client Dashboard (Tool)

AlayaCare's dashboard is a secure, integrated, online portal that provides clients, providers and authorized family members access to parts of their AlayaCare client health record to stay connected and engage in their care plan anywhere, at any time.



Based in: Canada
Other implemented jurisdictions: Australia

Ontario Passport | IF System

Ontario Passport

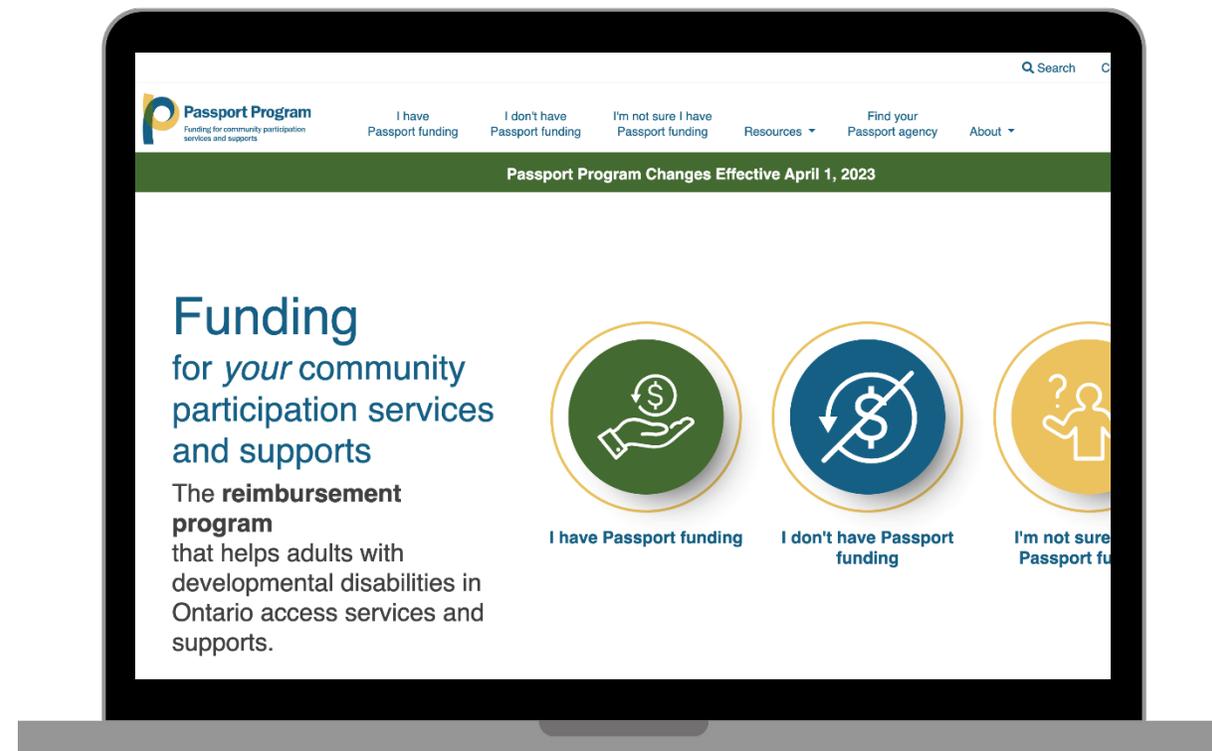
The Ontario Passport program is funded by the Ministry of Children, Community and Social Services (MCCSS), helps adults with a developmental disability be involved in their communities and live as independently as possible by providing funding for community participation services and supports, activities of daily living and person-directed planning. The program also provides funding for caregiver respite services and supports for primary caregivers of an adult with a developmental disability.

My Direct Plan (Tool)

MyDirectPlan (MDP) is an electronic method to submit Ontario Passport and SSAH expenses.

Passport eClaim (Tool)

The Passport eCLAIM is an electronic method to submit Ontario Passport invoices.



Based in: Ontario
Other implemented jurisdictions: N/A

Momentum | IF System

Momentum Developmental Support

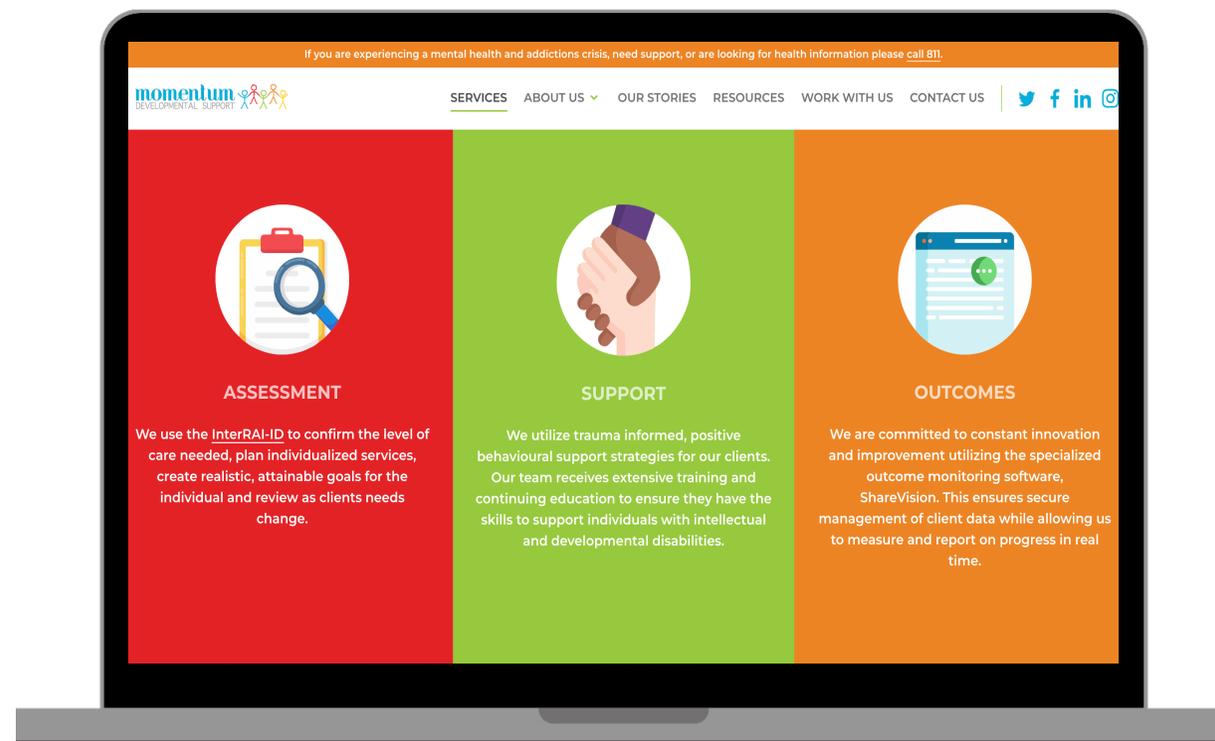
Momentum Developmental Support provides care and community support to adults with disabilities with a strengths-based, trauma-informed approach. Momentum is part of a group of community of care ventures, which fall under the umbrella of Seafair Capital.

Seafair Capital (Service)

Momentum uses a combination of supports from their trauma-informed professional team for the personalized supports in conjunction with Seafair Capital for the funding management aspect of their service.

ShareVision (Tool)

Momentum is committed to constant improvement utilizing the outcome monitoring software, ShareVision. This ensures secure management of client data while allowing us to measure and report on progress in real time.



Based in: Newfoundland
Other implemented jurisdictions: N/A

Accerta | IF System

Accerta

Accerta collaborates with all levels of government to transform public programs. Leveraging new technologies, we keep pace with elevated privacy and security demands and are responsive to the increased need for transparency and accountability related to public expenditures.

Contact Centre (Service)

Accerta owns and operates a state-of-the-art modern contact centre that provides multi-channel services for government customers. It includes a fully integrated multi-media contact management system that allows users to choose live-voice, webchat, chat-bot or IVR interactions.

Customized Portal/App (Tool)

Accerta works with governments to identify opportunities for technology to modernize service delivery. We offer everything from creating new apps to meet government stakeholders' evolving demands for access to expanding available online services in response to unique needs.



Based in: Toronto
Other implemented jurisdictions: N/A

03.

Features

In the subsequent slides, we delve into specific examples from two vendors to illustrate key features that we would recommend or seek in an ideal IF System.

Disclaimer: *While these examples provide a tangible demonstration of the outlined features, it is not an exhaustive representation of the vendors that have these features. These examples were chosen based on their clarity in demonstrating the key features identified thus far for the IF System.*

Scheduling | Key Features Analysis

What is it?

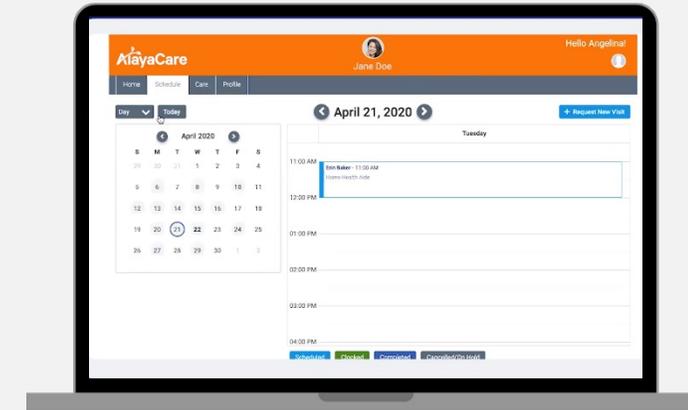
Scheduling is the ability to track a list of services i.e., menu of services and track a high number of data attributes and information related to services (some of the data to be captured in relation to services include address, budget code, etc.).

Case Study: AlayaCare

AlayaCare manages scheduling on both ends of the relationship: for the participant and the support worker. Their scheduling feature in the portal is comprehensive and matches up in real time with support workers schedules in the area in addition to ADL.

Sample Specifications for the IF Backbone

1. Real-time scheduling that accounts for the needs of respite and emergency staffing.
2. A user-friendly experience for both the individual (or whoever is managing their account) and the support workers.
3. A calendar view so individuals can plan their daily activities.



- 1. Scheduling**
2. Integrations
3. Client Dashboard
4. Budgeting
5. Recruitment
6. Employer Support
7. Reporting

Integrations | Key Features Analysis

What is it?

Integrations would mean flexible APIs and capability of integration with systems such as CCM, ICM, HRIS, e-MAR, LMS, and SAP.

Case Study: AlayaCare

AlayaCare's network of integrations help clients configure their own solution. Through AlayaSphere and AlayaCloud, you'll find APIs that automate or streamline operations and mold to current systems.

Sample Specifications for the IF Backbone

1. Open APIs (to evolve with current and future state)
2. Single Sign On (SSO)
3. Ability to integrate with other ministry systems such as HRIS, e-MAR, SAP, and others



1. Scheduling
- ✓ **2. Integrations**
3. Client Dashboard
4. Budgeting
5. Recruitment
6. Employer Support
7. Reporting

Client Dashboard | Key Features Analysis

What is it?

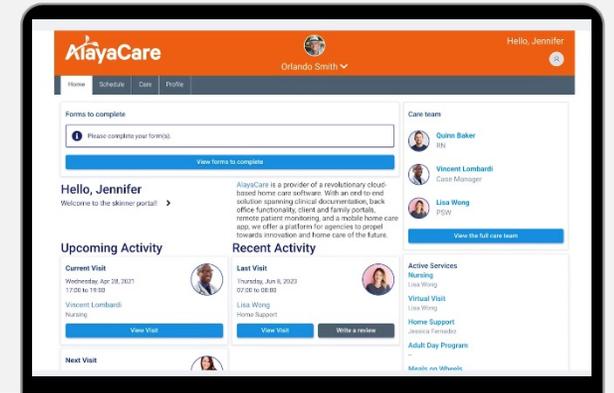
The client dashboard would track client profiles and client lifecycle management including history of services received (i.e., case notes, risks, personal plans and related activities). The dashboard can also be used for personalized planning.

Case Study: AlayaCare

AlayaCare's dashboard is a secure, integrated, online portal that provides clients, providers and authorized family members access to parts of their AlayaCare client health record to stay connected and engage in their care plan anywhere, at any time.

Sample Specifications for the IF Backbone

1. User-friendly interface for individuals & their support network to navigate
2. Permissions-based access for different levels of support (i.e., full access vs partial access)
3. Secure communication
4. Personalized experience & care plan
5. Increased client (and support network) engagement



1. Scheduling
2. Integrations
3. **Client Dashboard**
4. Budgeting
5. Recruitment
6. Employer Support
7. Reporting

Budgeting | Key Features Analysis

What is it?

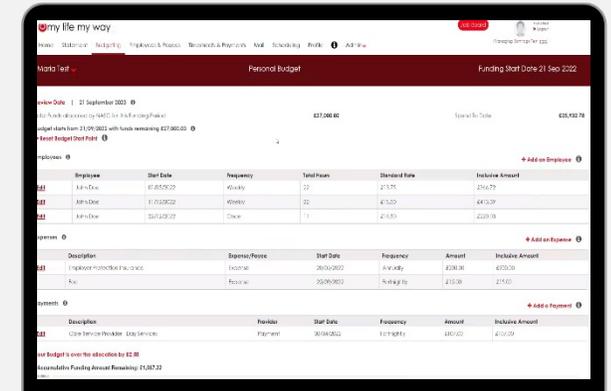
Budgeting is a feature for individuals and their families and/or support system to have insight into their spending patterns, so they can make spending decisions accordingly. This means having a feature that syncs individuals spending with their funding.

Case Study: Manawanui

Manawanui has a relatively sophisticated mechanism for tracking spending, although it wouldn't directly translate to our system in NS based on the projected breadth of support our government will be providing to individuals, as compared to the New Zealand and UK systems.

Sample Specifications for the IF Backbone

1. Visibility into account where funding is stored
2. Synced in real-time with spending
3. Correlations with programs and categories of funding



The screenshot displays the 'Personal Budget' section of the 'my life my way' system. It shows a table with columns for 'Employee', 'Start Date', 'Frequency', 'Total From', 'Disputed Date', and 'Include Amount'. Below this, there are sections for 'Expense' and 'Payment', each with a table of entries including 'Description', 'Expense/Type', 'Start Date', 'Frequency', 'Amount', and 'Include Amount'. A red banner at the bottom indicates that the budget is over the allocation by \$2.8K.

Employee	Start Date	Frequency	Total From	Disputed Date	Include Amount
John Doe	01/05/2022	Weekly	22	21.76	216.77
John Doe	01/05/2022	Weekly	22	4.50	443.09
John Doe	01/05/2022	Once	11	21.89	220.19

Description	Expense/Type	Start Date	Frequency	Amount	Include Amount
Employer contribution to KiwiSaver	Expense	26/06/2022	4 weekly	228.36	420.50
Bus	Expense	25/06/2022	5 weekly to	215.38	215.00

Description	Payment	Start Date	Frequency	Amount	Include Amount
Core Services Provider - Day Services	Payment	30/04/2022	1 x 18881	480.00	410.00

1. Scheduling
2. Integrations
3. Client Dashboard
4. **Budgeting**
5. Recruitment
6. Employer Support
7. Reporting

Recruitment | Key Features Analysis

What is it?

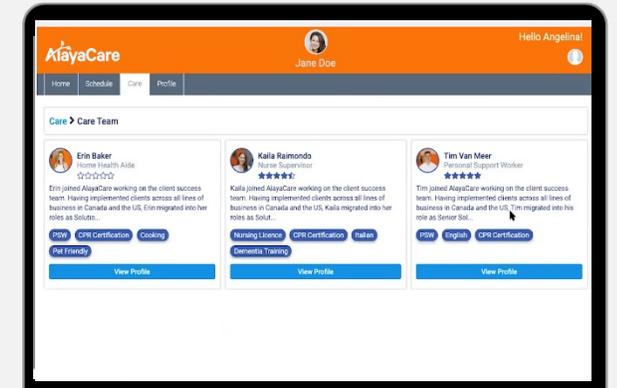
Recruitment is the ability to access support workers in the individual's area based on their schedule and support needs. This includes visibility into the employee's credentials, while giving employees an understanding of the employer's needs as well.

Case Study: AlayaCare

AlayaCare has a real-time, transparent hiring feature within their client dashboard which allows individuals to view available staff in their area and book based on their availability. It allows gives individuals the ability to indicate their level of satisfaction with the support.

Sample Specifications for the IF Backbone

1. Insight into employee credentials (for employer) / individuals needs (employee)
2. Real-time availability of staff
3. Visibility into care plans, medical information, etc. so there is a seamless transition between care teams



1. Scheduling
2. Integrations
3. Client Dashboard
4. Budgeting
5. **Recruitment**
6. Employer Support
7. Reporting

Employer Support | Key Features Analysis

What is it?

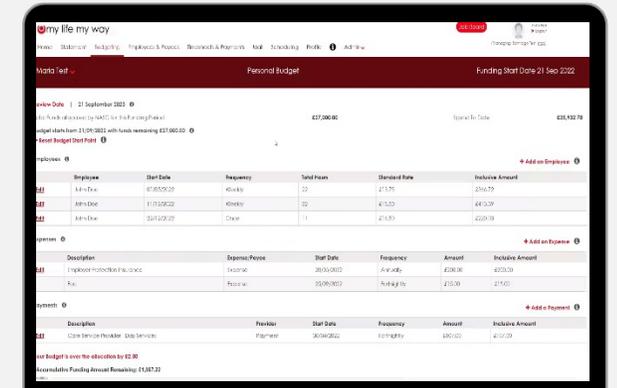
Employer Support involves guiding the individual in managing the processes involved with being an employer, from managing payroll to insurance to protect against incidents involving personal grievances.

Case Study: Manawanui

Manawanui has a suite of services to manage different aspects of being an employer including payroll, invoicing, taxes, third party payments, and employer protection packages.

Sample Specifications for the IF Backbone

1. Employer support that fits the requirements involved in Canadian / Nova Scotian laws and regulations
2. Employer and employee protection options
3. User-friendly administration



1. Scheduling
2. Integrations
3. Client Dashboard
4. Budgeting
5. Recruitment
6. **Employer Support**
7. Reporting

Reporting | Key Features Analysis

What is it?

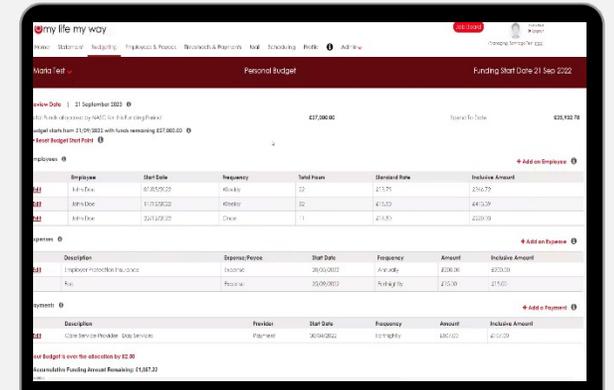
Reporting is a feature giving the funding source insights to the aspects involved with IF (spending patterns, compliance, recruitment, etc.). This feature would also be available from the individual's perspective, with insights that make sense for them.

Case Study: Manawanui

Manawanui manages scheduling on both ends of the relationship: for the participant and the support worker. Their scheduling feature in the portal is comprehensive and matches up in real time with support workers schedules in the area.

Sample Specifications for the IF Backbone

1. Spending patterns
2. Compliance tracking
3. Data-driven insights into main aspects of IF, including budgets, recruitment, ADL, etc.



1. Scheduling
2. Integrations
3. Client Dashboard
4. Budgeting
5. Recruitment
6. Employer Support
7. **Reporting**

04.

Analysis

A comparison and synthesis of the data collected to support the next phase of engagements and solution planning.

Analysis | Identified Requirements & Specifications

The following requirements have been identified throughout the jurisdictional scan process. These will be used as starting points for the project team to review as we develop requirements to be included in the Request for Proposal (RFP).

Scheduling

- Real-time scheduling that accounts for the needs of respite and emergency staffing
- A user-friendly experience for both the individual, their support network, and their care team
- A calendar view so individuals can plan their daily activities in conjunction with their care team's schedule

Integrations

- Open APIs (to evolve with current and future state)
- Single Sign On (SSO)
- Ability to integrate with other ministry systems such as HRIS, e-MAR, SAP, and others

Client Dashboard

- User-friendly interface for individuals & their support network
- Permissions-based access for different levels of support (i.e., full access vs partial access)
- Secure communication
- Personalized experience & care plan
- Increased client (and support network) engagement

Budgeting

- Visibility into account where funding is stored
- Synced in real-time with spending
- Correlations with programs and categories of funding

Recruitment

- Insight into employee credentials (for employer) / individuals needs (employee)
- Real-time availability of staff
- Visibility into care plans, medical information, etc. so there is a seamless transition between care teams

Employer Support

- Employer support that complies with laws and regulations
- Employer and employee protection options
- User-friendly administration

Reporting

- Spending patterns
- Compliance tracking
- Data-driven insights into main aspects of IF, including budgets, recruitment, ADL, etc.

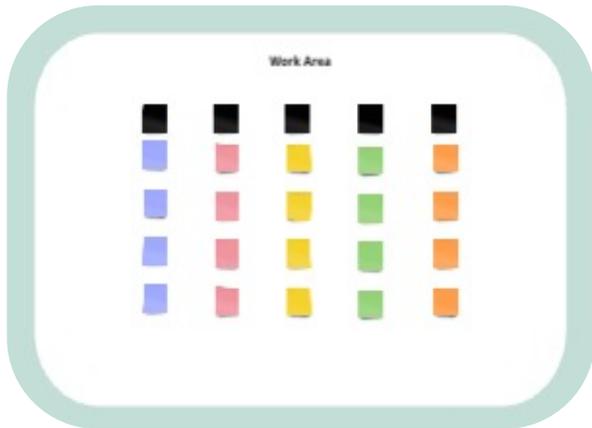
Analysis | Our Next Steps

Our next steps as a project team will be to leverage what we've learned through the jurisdictional scan and workshops with DSP and SLTC to begin developing requirements for the RFP. Following this work, we'd like to propose a series of virtual workshops where project team members will be able to help further refine, define, and prioritize these requirements with input from user engagements.

Our team will then incorporate these draft requirements into the draft RFP, utilizing weekly meetings for ongoing collaboration and refinement. This iterative approach is intended to help ensure efficiency in review cycles and support collaboration within the DSP and SLTC team.

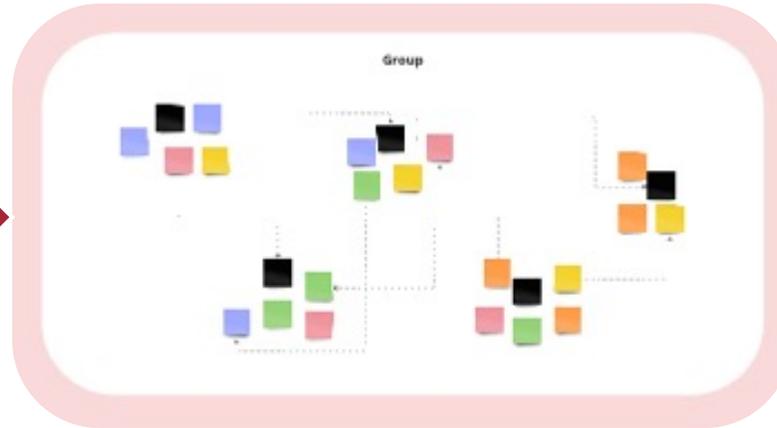
Observations

How have others implemented similar systems?



Relationships

Finding commonalities and opportunities within identified systems.



Workshops

Diving deep into focus areas to define requirements for the RFP



Thank You

Appendix:
Review of Programs against Features

Analysis | Feature Synthesis for IF Tools + Services

IF FEATURES (TOOLS + SERVICE)

Features	Scheduling	Integrations	Client Dashboard	Budgeting	Recruitment	Employer Support	Reporting	Scoring
Community Living BC (CLBC Portal + Vela)	?	×	×	✓	✓	✓	?	3
Ontario Passport (eClaim + MyDirectPlan)	×	×	×	✓	×	✓	?	2
Manawanui (Portal + Self-Managing)	✓	?	✓	✓	✓	✓	✓	6
AlayaCare (Portal + Dashboard)	✓	✓	✓	?	✓	?	✓	5
Momentum (Seafair + MDS)	✓	×	×	×	✓	✓	×	3