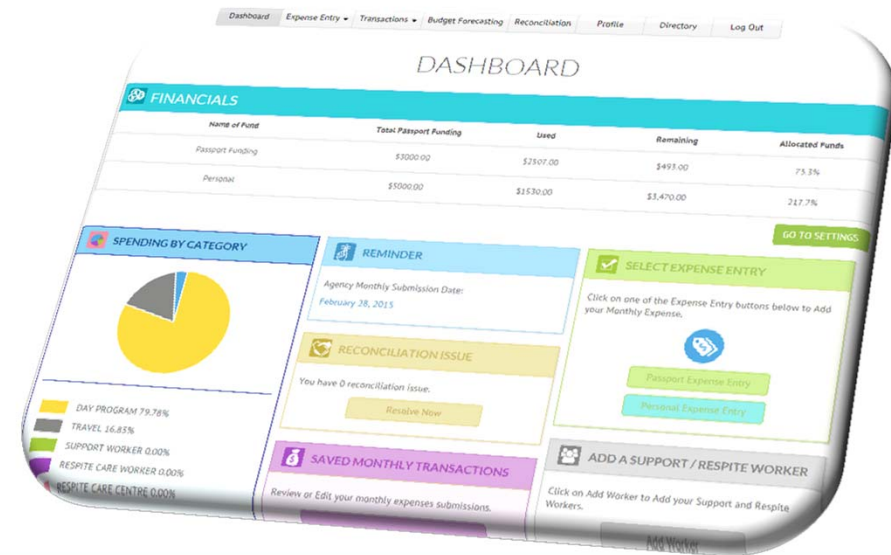


Community
Living
Toronto



My Direct Plan



Project Origin

- Community Living Toronto has a significant number of individuals & families who have chosen the self-directed funding route to manage their residential funds.
- Program staff have to spend a considerable amount of time doing book keeping related work.



Pilot Project

- Community Living Toronto will be working with **Darts Solutions** to develop a Residential module to their **My Direct Plan** application.



Pilot Project

- 2 year project that will run until March of 2017
- Community Living Toronto will be initially starting the pilot with 8 families.

(ISP/ LIGHTS/ IRMI)

- **Year 1 Goal:** +25 Families
- **Year 2 Goal:** +50 Families

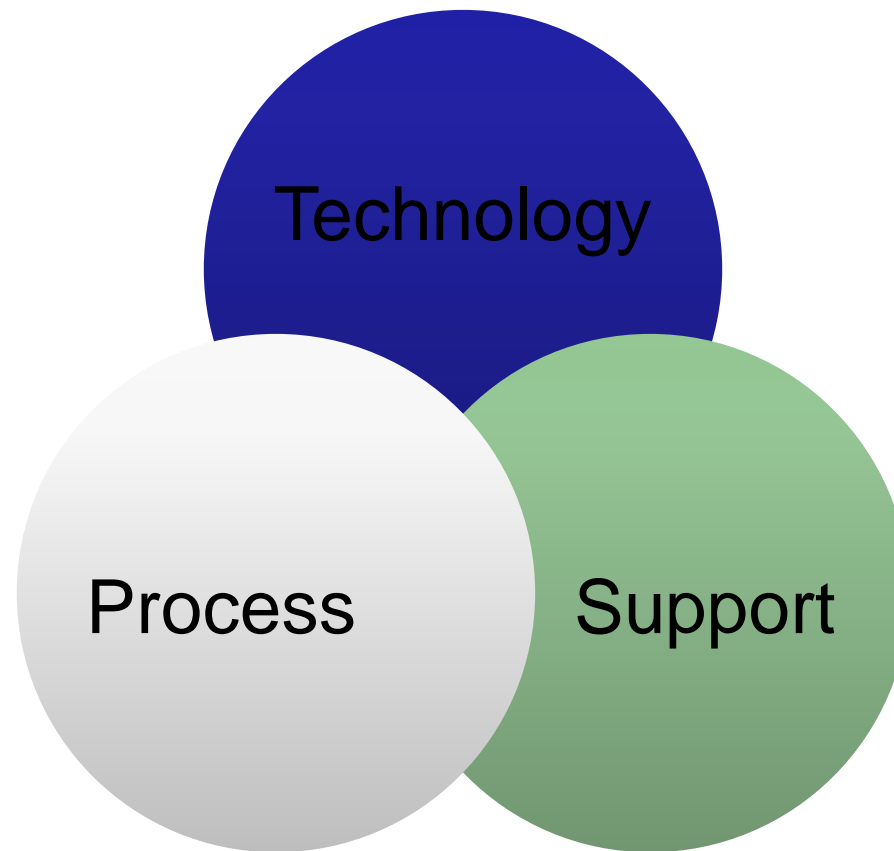


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Pilot Project



Technology

- **Darts** has been building 2 interfaces

1

The screenshot shows the 'PERSONAL EXPENSE ENTRY' page in the MyDirectPlan system. The page is titled 'TRANSPORTATION' and includes a navigation menu with options like Dashboard, Expense Entry, Transactions, Budget Forecasting, Reconciliation, Profile, Directory, and Log Out. The main form area has fields for 'Date of Travel', 'Travel Provided by' (with a dropdown menu), 'Travel Destination', and 'Purpose of Travel'. There are also fields for 'Expense Amount' and an 'Attach Receipt' button. Below the form, there are several colored buttons representing different expense categories: Transportation, Support Worker, Day Program, Education, Community Participation, Respite Worker, Respite Centre, Person Direct Planning, Administration, Housing, Medical, and Other. A 'Save Expenses' button and a 'Clear Expenses' button are also visible.

2

The screenshot shows the 'Recipient Profile' page in the MyDirectPlan system. The page contains a form with various fields for personal information. Fields include 'Name' (with sub-fields for First Name 'Jain', Middle Name, and Last Name 'Doe'), 'Date of Birth' (with dropdowns for month, day, and year), 'Gender' (with radio buttons for Male and Female), 'Has Developmental Services Ontario (DSO) Confirmed Eligibility?' (with radio buttons for Yes and No), 'Address' (with sub-fields for Address and Apt/Unit), 'City' (Toronto), 'Province' (ON), 'Postal Code' (M5R 2S7), 'Telephone' (416-968-0650), 'Mobile', 'Email' (cpruden@cltoronto.ca), and 'Language Spoken At Home' (English). A 'Save' button and a 'Clear' button are located at the bottom right of the form. A note '* Not actual screen' is overlaid on the bottom left of the form area.

Community Living Toronto Interface

Individual/ Family Interface



Technology

- Individual/ Family would use MDP to setup their profile:
 - Name
 - D.O.B
 - Address
 - Parent/ Caregiver
 - Agency
 - Support Worker
 - Password



Technology

The screenshot displays the MyDirectPlan web application interface. At the top, there is a navigation bar with links for "User GUIDE", "SUPPORT", "joe.bloggs@nydomain.com", "MyPROFILE", and "Sign Out". Below this is a dark header with the "MyDirectPlan" logo and the tagline "ONLINE DIRECT FUNDING MANAGEMENT". A secondary navigation bar contains "RESIDENTIAL FUNDING" with a dropdown arrow and a menu icon. Below this is a horizontal menu with "ADD EXPENSE", "REVIEW EXPENSES", "BUDGET PLANNING", "RECONCILIATION", and "Settings". The main content area is titled "Select Expense Category" and is divided into three columns:

- STAFF EXPENSE CATEGORIES** (orange header):
 - DIRECT SUPPORT (person icon)
 - BENEFITS (book icon)
 - TRAVEL (bus icon)
 - TRAINING (sun icon)
 - OTHER SUPPORT (paw print icon)
- EXPENSE CATEGORIES** (green header):
 - RENT/MORTGAGE (bus icon)
 - UTILITIES (sun icon)
 - REPAIRS/MAINTENANCE (book icon)
 - TRANSPORTATION (person icon)
 - PERSONAL NEEDS (paw print icon)
 - FOOD (sun icon)
 - INSURANCE (book icon)
 - PURCHASE OF SERVICE (person icon)
 - SOCIAL RECREATION (paw print icon)
 - PROGRAM EQUIPMENT (bus icon)
- OTHER EXPENSE CATEGORIES** (purple header):
 - MINOR CAPITAL/RENOVAT. (bus icon)
 - FURNISHINGS (sun icon)
 - ADMINISTRATION (book icon)
 - OTHER (person icon)



Technology

User GUIDE SUPPORT joe.bloggs@mydomain.com MyPROFILE Sign Out

MyDirectPlan

ONLINE DIRECT FUNDING MANAGEMENT

RESIDENTIAL FUNDING

ADD EXPENSE REVIEW EXPENSES BUDGET PLANNING RECONCILIATION Settings

TRAVEL [Rate per Kilometer]

FLAT RATE RATE PER KILOMETER

DATE OF TRAVEL September 28, 2015	PROVIDED BY TAXI	DESTINATION Sample Destination	PURPOSE OF TRAVEL Purpose Descriptions Here
DISTANCE 1,000.00 Km	RATE \$ 1,000.00	EXPENSE AMOUNT \$ 1,000.00	ATTACH RECEIPT BROWSE

CANCEL CLEAR ENTRY SAVE ENTRY

+ ADD ANOTHER EXPENSE

Technology

- Output file ready for Community Living Toronto (Integration Plan)

August 2015



Types of Expenses

Budgeted Total	\$100.00
Actual Expense	\$335.00
Difference	\$-235.00

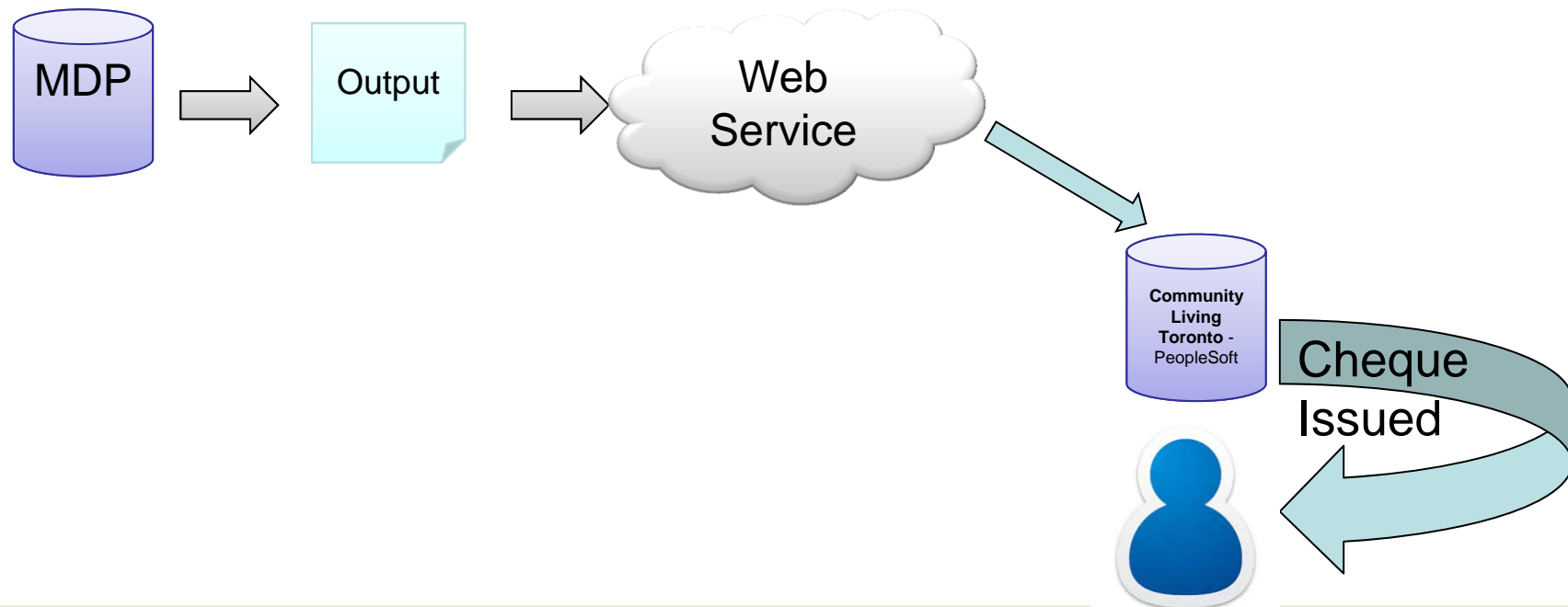
Include in Budget

EDIT



Technology

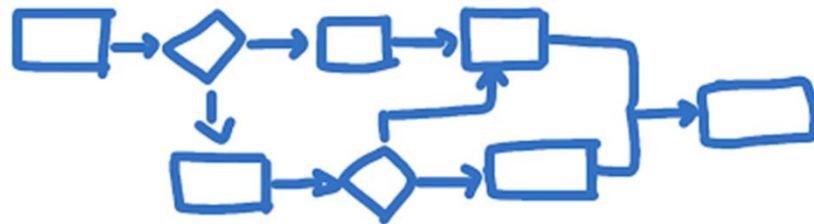
- Output file ready for Community Living Toronto (Integration Plan)



Process

Community Living Toronto will need to make changes to current processes to accommodate this new technology.

1. Finance
2. Onboarding



Process - Finance

Current process is manual and paper based.



MDP will introduce levels of automation and paperless processes

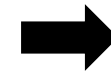


Process - Finance

Finance is facing a process change

Change Management

1. Communicate the message
2. Address the 'human' side
3. Make the formal case
4. Start at the top
5. Involve every layer



Process - Onboarding

Onboarding: Individuals acquire the necessary knowledge, skills, and behaviors to adopt change.

- 1) Families/ Individuals in Service
- 2) Community Living Toronto



Process - Onboarding

Families/ Individuals in Service:

- Frequent Communications blasts
- Info Session
- Account Setup



Process - Onboarding

Community Living Toronto:

- Technical Support from Darts Solutions
- Info Sessions
- Revamped Process Adoption



Support



Darts solutions will be offering various forms of support to families/ Individuals in Service and Community Living Toronto.

Individuals in Service

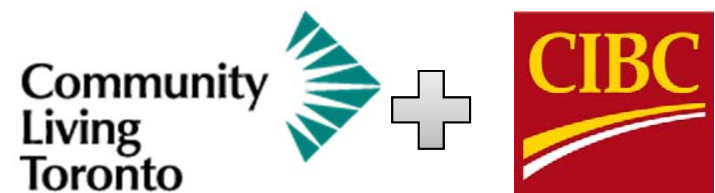
- Access to MDP technical Support
- Support Documentation
 - FAQ
 - Support Guides
 - Videos
- Support with Community Living Toronto

Community Living Toronto

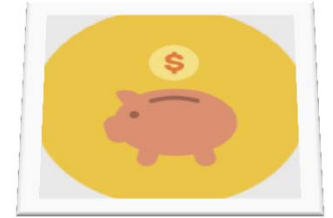
- Access to MDP technical support
- Customized Support documentation
- One-one-Support



Supported Banking Pilot



Project Origin



Community Living Toronto is working with CIBC to setup a simple & legal process for supporting the banking needs of individuals in service.

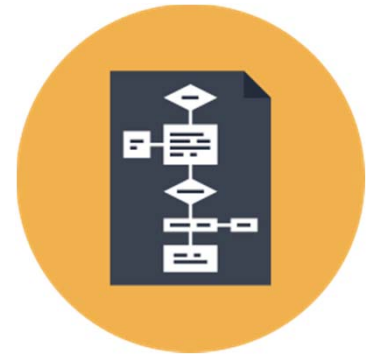
Allowing the support worker to be a modified power of attorney, to assist individuals in service with their banking needs.

Rationale:

1. Empower & engage individuals in service to participate in their financial planning and budgeting.
2. Establish a recognized standard process on an on-going basis
3. Success & momentum from this project can help influence other financial institutions to implement a supported banking process of their own.



Pilot Project



1. Develop a simple legal process for CIBC to follow.
 - Fill out the appropriate forms & documentation
 - Contact the Finance Service Rep at the participating CIBC branch and book an appointment (20 min/ individual)
 - Disclose the names of the participating individuals ahead of time.



Pilot Project

2. Pilot the process with 5-6 individuals

- Open the account at the main CIBC
- Individuals are then free to bank at a location that is close to their residence.
- Evaluate the feedback received from both sides



Pilot Project

3. Develop a communications plan

Internal communications outlining the details of the process (staff & individuals in service).

External communications to CIBC

- Appointment bookings
- Supported forms are complete



Pilot Project

4. Develop a success criteria

Formal document that will be sent to all stakeholders in the project to capture project experience.

- What went well?
- What needed work?
- Other areas for improvement?
- Lessons learned?



Pilot Project

5. Rollout standardized process

- Goal is to continue to work with CIBC and have this rolled out into a recognized process.
- Work with CIBC to have process expand outside of main branch.

